DOCUMENT RESUME

ED 248 195 SP 024 412

TITLE	Ways to Improve Schools and Education Project (WISE). Annual Report.
INSTITUTION	Southwest Educational Development Lab., Austin, Tex.
SPONS AGENCY	National Inst. of Education (ED), Washington, DC.
PUB DATE	30 Dec 83
CONTRACT	400-83-0007
NOTE	110p.; For the executive summary, see SP 024 413.
PUB TYPE	Reports - Descriptive (141)
EDRS PRICE	MF01/PC05 Plus Postage.
DESCRIPTORS	*Cooperative Programs; Educational Objectives; Education Work Relationship; Faculty Development; Higher Education; Inservice Teacher Education; *Private Financial Support; *Program Effectiveness; *School Business Relationship; School Community Relationship; Secondary Education; *Work Experience Programs
IDENTIFIERS	*Ways to Improve Schools and Education (Project)

ABSTRACT

The Ways to Improve Schools and Education (WISE) Project made an exploratory study of local school-business collaborative efforts to develop human resources and enrich the quality of education in the community. The focus of the study was on private sector voluntary efforts to help schools become more effective through staff development/inservice education. The base of operation was developed through: (1) interacting with school-business projects; (2) reviewing relevant literature; and (3) assisting with the establishment and implementation of collaborative activities at three pilot sites in the Southwest. At each site, a Liaison Team was organized, consisting of representatives from: (1) the school district; (2) a collaborating business or chamber of commerce; (3) an institution of higher education; (4) the state education agency; and (5) the Southwest Educational Development Laboratory. The project: (1) identified and prioritized issues involved in school-business collaboration; (2) wrote guidelines to resolve these issues; (3) developed models for implementing collaboration; (4) drew conclusions which indicated that education and private sector collaboration is a viable and necessary concept which benefits the schools, business, and the community, and that liaison teams are an effective means of facilitating this collaboration; and (5) made recommendations for improving and facilitating education-private sector partnerships during fiscal year 1984. (Author/JD)

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ED248195

ANNUAL REPORT

WAYS TO IMPROVE SCHOOLS AND EDUCATION PROJECT

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December 30, 1983

Southwest Educational Development Laboratory

Austin, Texas

SP 024 412

ANNUAL REPORT

WAYS TO IMPROVE SCHOOLS AND EDUCATION PROJECT (WISE)

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In Compliance with Contract No. 400-83-0007, Project No. P-4

Funded by: National Institute of Education (NIE)
Washington, DC

Project Period: December 1, 1982 through November 30, 1983

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This report and the work upon which it is based was conducted pursuant to NIE Contract No. 400-83-0007, Project P-4. The contract funds were provided by the National Institute of Education (NIE) to the Southwest Educational Development Laboratory (SEDL), a private non-profit institution. Opinions expressed in this report do not necessarily reflect the position or policy of NIE and no official endorsement by NIE should be inferred.

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ABSTRACT

This is an abstract of a report on the Ways to Improve Schools and Education (WISE) Project's exploratory study of local school-business collaborative efforts to develop human resources and enrich the quality of education in the community. The focus of the study has been on private sector voluntary efforts to help schools become more effective through staff development/inservice education.

The Project's base of information was developed through (1) interacting with school-business projects in the United States, (2) reviewing relevant literature, and (3) assisting with the establishment and implementation of collaborative activities at three pilot sites (Albuquerque, New Mexico; Austin, Texas; and Oklahoma City, Oklahoma). At each site, a Liaison Team was organized, consisting of representatives from: (1) the school district, (2) a collaborating business or chamber of commerce, (3) an institution of higher education, (4) the state education agency, and (5) the Southwest Educational Development Laboratory.

At a two-day working conference of the liaison team members, the Project accomplished the following: (1) identified and prioritized issues involved in school-business collaboration, (2) wrote guidelines to resolve these issues, (3) developed models for implementing collaboration, (4) drew conclusions which indicated that education and private sector collaboration to improve schools is a viable and necessary concept which benefits the schools, business, and the community, and that liaison teams are an effective means of facilitating this collaboration, and (5) made recommendations for further activities to improve and facilitate education-private sector partnerships during FY84.

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I. INTRODUCTION

A. RATIONALE

Public schools in the United States are being asked to make major reforms in order to improve the quality of education. But the costs of many of these reforms are too expensive for the funds currently available to schools. In an era of declining enrollments, diminishing public confidence and fewer federal funds, schools are experiencing increasing costs. Many communities have refused to raise additional tax or bond money for school improvement. In effect, schools are being asked to do more with less.

Many school districts are nevertheless using community resources to upgrade the quality of the education they provide. These districts have formed partnerships with local business, industry, labor, higher education, and other organizations and agencies in order to use local resources more effectively.

This is a report on the Ways to Improve Schools and Education (WISE) Project's exploratory study of local school-business collaborative efforts to develop human resources and enrich the quality of education in the community. The focus of the study is on private sector voluntary efforts to help schools become more effective through staff development/inservice education.

Inservice education for teachers and other school staff has always been important to school improvement (McLaughlin & Marsh, 1978). Such staff development is even more important now when schools need to make the most effective use of available resources, especially human resources.

Improvements in education generally focus on the concepts of "quality education" and/or "effective schools." The following definition and discussion are offered as a basis for discussing these concepts in this study:

> Quality education is the outcome of effective schools and includes a range of experiences that (1) focus on learner academic achievement, (2) employ a variety of teaching methods, (3) promote learning on the part of all students, (4) take into account individual differences, (5) produce learner competencies in terms of measurable knowledge and skill outcomes, and (6) develop positive student behavior in and out of the classroom.

A description of effective schools is necessarily general in order to include several characteristics. The effective school

concept is complex and produces considerable disagreement among educators who discuss it. There does seem to be consensus, however, on some assumptions regarding effective schools (Westbrook, 1982, pp. 7-10):

(1) Effectiveness is on the same qualitative continuum which includes ineffectiveness.

(2) The factors which make a school effective are common to all schools. There is no magic in the one and not the other. Rather, it depends upon the nature of the factors and how they are implemented. Among these factors are:

Attitudes	Instruction	Staff
Community Involvement	Leadership Roles	Students
Facilities	Parent Involvement	Other
Goals	Skills	factors

(3) Effective and less effective schools both have "central actors" or "key players" who interact. These include:

School staff	Parents	Facilities
Students	Community	

(4) Effective schools research has been primarily descriptive, and thus does not determine cause and effect. It does not, for example, tell us whether the effective teacher creates the effective school, or whether the effective school influences the teacher to behave in effective ways. It seems likely that there are multiple combinations of interaction of actors and factors which improve effectiveness in various environments.

(5) Effectiveness research is reported in terms of commonalities of effective schools (i.e., those which provide quality education).

Some of the researchers of school effectiveness are particularly interested in equal educational opportunity and high quality education for disadvantaged children. These researchers and many educators have been immersed in looking for effective ways for schools to meet the needs of relatively disadvantaged as well as advantaged students. Several studies indicate that integrated schools with supportive teaching-learning climates tend to have these results: (1) positive racial attitudes by minority and majority students develop as they attend school together, (2) minority children tend to gain a more positive self-concept and a more realistic conception of their vocational and educational future, (3) academic achievement rises for the minority children, and (4) relatively advantaged majority children continue to learn at the same or higher rate (Weinberg, 1977a, 1977b; Edmonds, 1979;

Epps, 1979).

The findings of the educational researchers who were seeking ways to improve the quality of education for minority students in desegregated schools supported and emphasized the findings of research on conditions for improving general school effectiveness. As Kirk and Goon noted (1975), the conditions--identified in studies reviewed by themselves, Katz (1964), St. John (1970) and others--are not unique to success for minority students in a desegregated setting, but that "they are vitally important to academic success for anyone in any educational setting."

In general, the same characteristics which correlate with effective schools also correlate with integrated schools. It seems that these characteristics--high expectations, success begetting success, positive behavior management and environment, cooperative staffs, and a strong leader who has a definite goal/plan and communicates well with staff and consumers (e.g., students, parents, community)--also correlate to corporate effectiveness. These characteristics are similar to the "Lessons from America's Best-Run Companies" which are discussed in Peters and Waterman's widely read and often quoted In Search of Excellence (1982). And, as in much of the effective schools literature, they do not discuss how a company can develop the attitudes, skills, knowledge, and conditions needed for excellence/effectiveness.

There has been during the past decade and a half, however, considerable progress in human and organizational development which indicates that much is known about the conditions which correlate with effectiveness and how to develop the attitudes, skills, and knowledge necessary for these conditions. Much of this expertise is embodied within the related concepts of andragogy and human resource development (HRD).

In business and industry and in continuing education, andragogy, the art and science of teaching adults (Knowles, 1980, pp. 40-42), is based increasingly on assumptions of respect for individuals and their capacity for professional growth. Other andragogical assumptions which have strong implications for inservice education and other adult educational practices, are that as individuals mature (Knowles, 1980, pp. 43-45):

1. their self-concept moves from one of being a dependent personality to one of being self-directed;

2. their reservoir of experience becomes an increasingly rich resource for further learning;

3. they attach more meaning to those learnings they gain from experience than to those they acquire passively;

4. their time perspective changes from one of postponed application, and their orientation towards learning shifts from one of subject-centeredness to one of performance-centeredness.

Many American businesses have adopted these assumptions as bases for developing human resources. In an era of increasing competition from abroad and of an economy shifting from an industrial base to one of service and information processing, the most important resources are no longer natural resources or even capital, but human resources (Dahl and Morgan, 1983, p. 3). Staff and consultants in human resource development have become the fastest growing job classifications in the business world.

There is a widely-held and spreading belief that many corporations are providing high quality and cost-effective HRD inservice education for their employees. Some educators believe that the corporate sector has exceeded the education sector in the recognition of how learning is instrumental to economic and organization productivity. Herman Niebuhr, Jr., Vice President of Temple University, has said that business successes in this area display "evidence of educational innovation, both substantive and methodological, far beyond the models and innovations of higher education," and have made corporate educational enterprises competitive with public education (1982). There is evidence to support Scobel's (1980) assessment of the progress in HRD in the last two decades:

> HRD has probably learned more about learning and the potential for high-level development than evidenced in either the applied educational or academic research arenas. HRD has come of age. It trains well. It educates well. It develops well.

Human resource development is one of the ways in which the private sector can assist schools in becoming more effective. Efforts to improve the quality of education in public schools must include staff development programs to improve classroom teaching. It is not likely that the quality of education will rise any higher than the quality of teaching. But each classroom teacher is only one part of a multi-part education system. The effectiveness of this system can be lower than necessary because of the low effectiveness of any one part or of several parts. Administrators and all others of the district and school staffs have important parts to play in establishing and maintaining a climate for teaching and learning. If inservice education is to improve the productivity of the system, it is likely that the several parts of the system will need the inservice. While training alone cannot maximize productivity, it seems clear that staff development/ inservice education (SE/IE) will be crucial to any improvement efforts (McLaughlin & Marsh, 1978).

Much of the training for educators to become competent in their profession takes place after they have entered the profession. Recent studies have told us something about this induction process. Preservice preparation is similar in the various college programs and does not fully prepare new educators; they still have to undergo difficult times before they make the adjustments necessary for survival (Ryan, et al., 1980). Recent studies indicate that teachers receive little guidance or support in this socialization process as they work things out for themselves, often resorting to trial and error methods (Hall, 1982; McDonald, 1980; Lortie, 1975; Joyce 1976b).

Rather than through trial and error learning, it seems that this on-the-job training could be done more efficiently with inservice education (IE). But a large majority of educators polled in a recent nationwide sample reported that they perceived the type of assistance and development opportunities available through inservice training and continuing education as "weak, impoverished and a relative failure" (Joyce, et al., p. xvii, 1976a). More recently, many teachers and other school staff members have continued to express dissatisfaction with the quality of inservice education available to them (Hall, 1982; Luke; 1980).

Not all school inservice training is of poor quality. Many schools and districts have excellent staff development programs that can serve as models for emulation. Even the best of programs, however, can still be improved. And one of the characteristics of effective training programs are their staffs' desire to improve still further. Thus, inservice programs, anywhere on a quality continuum of poor to excellent, can benefit by taking advantage of improved training practices and increased resources. It would seem that human resources are as critical to educational effectiveness as they are to business productivity. And it is clear that school and business need not compete, that cooperation in human resource development can benefit both. It is well known that schools, districts, and other educational agencies can learn much from each other. Many school staff development programs, for example, could probably be improved if they would more often follow the practice of learning from each other's successes and failures. Sharing, between public education and the private sector also can be mutually beneficial.

This is certainly not to say that all corporate training is appropriate for schools. Rather, the suggestion is that one of the ways in which business and industry have profited from public education is by borrowing those staff development practices and research which could be adapted as part of corporate staff training. And, in turn, corporate inservice practices and research may have elements which can be used to benefit schools. This seems particularly appropriate during a period in which business and

industry have relatively more resources for staff development than do schools.

Most business contributions to schools have been in the nature of executives doing voluntary consulting work, funding other consultants and short-term programs for students, and most often, providing funds, advice, and course-related job experience for career and/or vocational education courses. A literature search for school-business relationships brings in more sources on career and/or vocational education and the transition of youth from school to work place than any other topics. The literature includes little information on adapting business training practices for use with school staffs except with regard to career and/or vocational training.

B. STATEMENT OF THE PROBLEM

The problem addressed by the Ways to Improve Schools and Education Project is the need for models and guidelines for effective education and private sector collaboration in staff development/inservice education.

C. GOAL AND OBJECTIVES

The FY83 goal and objectives of Project WISE can be stated as follows:

To establish a base of information from which to develop an efficient process for cost-effective collaboration of businesses, state education agencies, local education agencies, and higher education agencies in inservice education for school staffs.

Objectives

(1) To identify business and industries which provide training that may be appropriate for use by the region's LEAs in serving their IE needs.

(2) To establish contact with these businesses and industries and develop a liaison between each one and Project WISE.

(3) To identify appropriate school districts willing to collaborate with the project.

(4) To establish liaison teams within each LEA for the purpose of managing project activities in each district.

(5) To implement training program with collaborating LEAs,

SEAs, and businesses.

(6) To evaluate the project's planning and implementing processes.

(7) To prepare a written draft of a model(s) and guidelines for review by the liaison team members and other practitioners and consultants.

D. LIMITATIONS

Ways to Improve Schools and Education Project is a pilot project to explore an innovative concept for a collaborative teaming of several public and private entities and to develop a set of prototype models and guidelines which will be tested in FY84. The Project's limitations are those generally inherent in the pilot and small scale nature of such efforts.

Although Oklahoma City and Albuquerque are readily accessible by air, limited funds narrowed staff travel options. Multiple visits to sites by the Project's Senior Researcher would have required fewer LT members traveling to the October conference. Considering the conference's success, the choice to invite all LT members seems to have been appropriate. However, one or two visits to the Albuquerque and Oklahoma City sites probably would have improved the facilitation and monitoring of project activities at those sites. Thus, reports of progress with respect to organizations and implementation of site collaboration are limited mostly to verbal reports from site contacts.

Project staff had more opportunities to be directly involved in Austin's school-business collaboration (S-B C) activities. In Austin, a Project staff member is a member of the AISD Adopt-a-School Advisory Council and has had more direct access to the school, business, SEA, and HEA staffs.

The several differences in backgrounds and stages of development of S-B C at the three sites precludes comparability among them. Thus, generalizing about findings and developments with the three sites must be limited and done with care.

II. PROCEDURES

This project is an exploratory study to help schools increase their productivity by using private sector resources. The study's first step has been to work directly with three local education agencies (one in each of three states in the SEDL region). Each LEA was then teamed with a collaborating business with appropriate training capabilities, and a higher education agency and state education agency. Representatives from each of these agencies constituted a liaison team whose function was to manage the efforts to increase the effectiveness of IE for LEA staff. Data obtained during this year are the basis for conceptualizing, developing, and (during FY84) testing one or more models and guidelines for collaboration between schools and agencies to make IE training more productive.

A. SITE SELECTION

1. Methodology

The initial objectives of Project WISE centered on the identification and selection of its three sites. The first activity to accomplish these objectives was to establish criteria for the selection of collaborating agencies. These criteria are listed below by type of agency.

a. Criteria for selection of agencies

1) Local education agency

- Have a need(s) which might be met by effective training of school staff.
- Make this staff available for training to be completed before October 1983.
- Provide a staff member, with responsibility in school IE, to serve on the project liaison team for that site.

To limit travel costs, priority was given to districts which were closer to SEDL and/or readily accessible.

2) Higher education agency

- Be in close proximity to the site LEA.
- Provide a staff member, with knowledge and experience in staff development/inservice education for LEAs and business, for the project liaison team.

3) State education agency

- Provide a staff member, with responsibilities for SD/IE in LEAs, for the liaison team.

- Assist with dissemination of information about project outcomes.

4) Business

- Provide a staff member, experienced in staff development (SD) training, for the liaison team.

- Voluntarily provide staff training to meet the need identified by the LEA.

b. Identification and Selection of Agencies

Initial site selection activities were based on location and travel considerations. These pointed to districts close to Austin, Texas, and to their SEA as well as those having a readily accessible airport. Thus, the following three areas were tentatively identified: (1) Austin, Texas; (2) Albuquerque, New Mexico; and, (3) Oklahoma City, Oklahoma.

Austin, the closest school district, recently held a bond election and utilized a broad community-based task force which indicated that the district could generate widespread community involvement, including that of local business resources. An Albuquerque Public Schools central administrator, who serves on the WISE Project Advisory Board, advised Project staff that conditions seemed favorable in his school district for its participation in Project WISE. Of the other four states of the SEDL region (Arkansas, Louisiana, Mississippi, and Oklahoma) with LEAs close to their SEA as well as other necessary agencies, Oklahoma City is the most accessible.

Because the greater Oklahoma City area contains several school districts, the Oklahoma SEA staff development director was asked to suggest appropriate LEAs there. Subsequently, superintendents of three potential districts were contacted in Oklahoma. The Putnam City School District was selected as most promising. Contact was made directly with the superintendents of the Austin Independent School District and the Albuquerque Public Schools. Information about the project was provided for superintendents of these three districts.

2. Issues/Problems and Resolutions/Solutions

Of the three sites tentatively identified, Albuquerque, New Mexico, and Austin, Texas, became project sites. It was necessary

to select another site in Oklahoma when it appeared that the business which had been selected for Putnam City might not be able to participate before October 1983. The local business there, an outlet for computer hardware and software, was waiting for project approval from its home office in another state. As a result, Oklahoma City was then selected as the Oklahoma site.

The Albuquerque Public School (Albuquerque PS) Liaison Team member preferred to work with his local Chamber of Commerce in Project WISE, since there was already a working relationship between the two agencies in a vocational education Career Guidance Institute (CGI). Similarly, the Oklahoma City Public Schools (OCPS) preferred to collaborate with its local Chamber of Commerce (C of C). These two agencies had established an Adopt-A-School (A-a-S) Program in Oklahoma City in 1979, but it had lost momentum as some key personnel involved in it had retired or changed jobs. The original Oklahoma City Adopt-A-School Program depended mostly on donation of equipment or other tangibles to schools. The Oklahoma City Schools' Liaison Team (LT) member indicated that Project WISE was a way to revitalize and broaden their program to include intangibles such as school staff training.

In Austin, Project WISE staff and representatives of the Austin Independent School District (AISD) and the Austin Chamber of Commerce (Austin CC) decided that the Project would include the Austin CC, even if it were decided later that only one business would be involved in the training of school staff. This approach would make it easier to identify and select a business and to involve other businesses later.

3. Description of Sites

The three site cities involved in Project WISE rage in population from 332,239 in Albuquerque, to 417,000 in Oklahoma City. Austin is in between at 386,000 (see Table 1 below). Albuquerque has, however, the largest student population, with a total of approximately 56,314. Oklahoma City has approximately 41,649 students.

Table 1
PROJECT WISE SITES
City and Public School Student Populations, 1983

	City Pop.	Total School	Anglo	Black	Hisp.	Nat. Amer.	Asian/ Oriental
Alb.	332,239	75,330	39,233 53.5%	2,546 3.5%	28,198 38.4%	2,027 2.7%	1,264 1.7%
Aus.	380,000	56,214	29,421 52.3%	10,854 19.4%	15,939 28.3%		
O.C.	417,000	41,231	22,231 53.3%	14,779 35.5%	1,882 4.5%	1,521 3.7%	1,236 3.0%

The three school districts are similar with regard to percentage of Anglo/white student populations. Each has a slight majority of Anglo students, with Austin at 52.3%, Oklahoma City at 53.3%, and Albuquerque at 53.5%. This is a range of Anglo enrollments of only 1.2% among the three districts. The Austin district is tri-ethnic, with minority enrollments of 19.4% Black and 28.3% Hispanic. Albuquerque schools, with an Hispanic enrollment of 38.4%, and Oklahoma City schools with a Black enrollment of 35.5%, are essentially bi-ethnic. All three school districts have individual schools which are not "balanced" in the sense of having enrollment percentages similar to the district ratio. Valley High School in Albuquerque, for example, the initial school in the Career Guidance Institute program, has a 70.8% Hispanic enrollment in its total of 1, 705 students. Anglo enrollment at Valley High School is only 25%, with more than 4% comprised of Native American, Black, and Asian.

All three cities have had for at least a decade some "high tech" industry. All three have experienced surges of growth in this industry. All three have metropolitan populations considerably higher than that of the cities.

The Albuquerque Career Guidance Institute began in one high school in 1980, after a year of planning. It was planned and initiated by representatives of the Albuquerque school system and Chamber of Commerce and the Edna McConnell Clark Foundation of New York City. It is funded by the Clark Foundation. The Oklahoma City Adopt-a-School Program began in 1979, flourished, and then declined in activity. Austin's formal school-business collaboration activities have begun only this year. Successful school-community efforts played a role in a successful $2 million school bond election during the spring of 1983. These efforts also helped establish a context for education-private sector collaboration.

B. LIAISON TEAM SELECTION

1. Methodology

Liaison Teams were to be composed of at least five members, with at least one representative of each of the following agencies in or near the site school district. Criteria for selection of the individuals are also indicated below:

-- Local Education Agency
- Be designated by the Local Education Agency superintendent to participate in Project WISE.
- Have responsibility for LEA staff development/inservice education.

--Business or Chamber of Commerce
- Be authorized to serve as a Project WISE Liaison Team member.
- Have expertise in staff development/inservice education and/or,
- Have contacts with training resources in the private sector.

--State Education Agency
- Be authorized by the State Education Agency to serve as a Project WISE Liaison Team member.
- Have staff development/inservice education responsibilities

-- Higher Education Agency
- Be authorized or have clearance to serve as a Project WISE Liaison Team member.
- Have expertise in staff development/inservice education in business and/or education.

-- Southwest Educational Development Laboratory
- Project WISE Senior Researcher.

Letters of Understanding, with details of the Project goal and major objectives and the responsibilities of each participating agency, were prepared by Project Ways to Improve Schools and Education staff, signed by the Executive Director of Southwest Educational Development Laboratory (SEDL), and sent to each participating agency for the signatures of an appropriate official in each agency.

For the Albuquerque site, the individuals who became the LEA and business representatives on the Liaison Team were initially identified as a result of suggestions by the school administrator on the Project WISE Advisory Board. These two are: (1) an official of the Albuquerque Chamber of Commerce, who had close

ties with local businesses willing to provide voluntary training to school staff members; and, (2) an Albuquerque high school principal who indicated that his staff could benefit from such training. The principal was contacted after clearance to do so was obtained from the Albuquerque Public School superintendent. These two team members suggested a University of New Mexico dean to be contacted as a potential representative from higher education. He was eventually selected. The New Mexico State Education Agency team member was selected from the office which has responsibility for inservice training of certified staff in New Mexico Local Education Agencies.

In the Austin Independent School District, Project WISE staff met with the superintendent and provided him with information about WISE. He expressed enthusiasm for the project and said he wanted to discuss it with his staff. Later the superintendent informed Project WISE staff of his decision that the district would participate.

The Oklahoma State Education Agency team member was selected from the Teacher Education and Staff Development Section. The superintendent of the Putnam City schools identified his LEA's director of SD as a Project WISE Liaison. The superintendent also identified a potential collaborating business, a local representative of a microcomputer hardware and software manufacturer/distributor. The Oklahoma HEA representative, a University of Southwestern Oklahoma professor of Industrial Arts, was selected from among several who were suggested by the Oklahoma SEA.

2. Issues/Problems and Resolutions/Solutions

Project WISE experiences with its three sites indicate that some collaborative efforts take more time and effort than others. Of the several factors which might influence the amount of time and effort required, the most important two factors in Project WISE appear to be: (1) how much experience in, and/or machinery for, a district already has that may be used for school-business collaboration; and (2), the decision-making style of the school district.

It was relatively easy to get training activities underway in Albuquerque. Here the schools and Chamber of Commerce shared the Career Guidance Institute, a project to better prepare youth for school to work transition. It was a simple process to form a Liaison Team and to expand the training of vocational education teachers to include others such as those in math and science, who would volunteer for summer training. It was easy to add more businesses which could help provide teachers with more skills and knowledge that they could use in their classrooms.

Although the Adopt-a-School program in Oklahoma City had declined, there were "contact" people in the schools and the C of C who knew where to start to revitalize the program. With the selection of energetic and capable LT members, the program soon had 25 businesses (with favorable prospects of more being added) and every school in the district had at least one adoptor.

Except on an informal, one-to-one, school-to-business basis, the Austin Independent School District has had limited school-business collaboration. Nevertheless, when Project WISE staff met with the superintendent to discuss his district's involvement, his response was positive, saying only that he wanted to discuss the matter with his staff before making a final decision. While awaiting the outcome of this discussion, Project staff took the necessary steps for the Texas Education Agency to select their Director of Staff Development as Liaison Team member. It was agreed that his selection was appropriate, regardless of which school district was selected. Preliminary general discussions about the Project were also held with potential businesses and HEA representatives.

The AISD selection of its LT representative come with the district's announcement that it would participate in the Project. Project WISE staff then met with the AISD representative, a man who had been the district's Desegregation Specialist and, as such, had experience with staff development and meeting with the public. Before selecting a school or schools in the district, he preferred to discuss the Project with the district's principals, and to determine if they wanted to assess their schools' inservice needs before initiating training. Some principals asked for an assessment of needs. The AISD and Project WISE LT members then developed an instrument to assess training needs in the district's schools.

The school district decided that Project WISE efforts would be most beneficial in the development of a training program for a magnet junior high school, planned as part of the AISD desegregation plan. The school is to emphasize technology and business as its magnet concepts. With its burgeoning high technology industry, Austin seems an appropriate site for such a magnet school. But because there is uncertainty about when the school will open, and because the principal and staff for the magnet school have not been selected, Project WISE staff members recommended to AISD that a collaborative technology and business project be piloted in an existing junior high as soon as possible. Planning for this activity is underway.

Implementation of Project WISE in AISD has not been rapid. It has been, however, consistent with the Project's own principles as based on its predecessor project's (Ways to Improve Education in Desegregated Schools) guidelines for inservice education and

desegregation (King, 1982). In order to be most effective, school staff development must be based on the school's self-identified needs and include principals and staff as "part owners" in the project. Meanwhile, HEA and C of C representatives have been added to the Liaison Team.

One other time-related problem has to do with finding time in the schedules of already busy people to serve as LT members who can effectively facilitate S-B C. To help solve this problem, Project WISE has added additional school and business team members. Among the members of the Project's original teams, four have been promoted within their respective agencies and two others have taken new jobs with increased responsibilities.

One LT member has been designated as chairman of Austin's new Adopt-a-School Advisory Committee. And the Project WISE LT member has been designated as a member of that committee.

3. Description of Liaison Teams

PROJECT WISE LIAISON TEAM MEMBERS

Albuquerque, New Mexico

Mr. Milton Baca, Principal
Valley High School
1505 Candelaria
Albuquerque, New Mexico 87107

Mr. Baca is the most involved of the Albuquerque Public Schools staff with school-business collaboration and is also chairman of the board of the General College of New Mexico.

Mr. Bill Anderson
Career Guidance Institute
Chamber of Commerce
P. O. Box 25100
Albuquerque, New Mexico 87125

Mr. Anderson is director of the Career Guidance Institute, Albuquerque Chamber of Commerce, and was Secretary of Labor, State of New Mexico, for Governor Jerry Apodoca. He is administrator and creator of the Private Industry Council in Albuquerque, one of the start-up sites.

Ms. Rosanna Gonzalez
Career Guidance Institute
Chamber of Commerce
P. O. Box 25100
Albuquerque, New Mexico 87125

Ms. Gonzalez is a graduate of The University of Texas at Austin with a major in sociology. She has a MA in Rehabilitative Counseling from the University of New Mexico and has been Deputy Administrator for the Private Industry Council in Albuquerque.

Ms. Laine Renfro, Supervisor
Home Economics
State Department of Education
Education Building
State Capitol Complex
Santa Fe, New Mexico 87501

Ms. Renfro is State Supervisor of Home Economics for the New Mexico Department of Education. In this capacity she evaluates training programs, and develops and provides staff development/inservice education to school staffs and community based organizations.

Dr. John Rinaldi
Dean of General College
Onate Hall 115
University of New Mexico
Albuquerque, New Mexico 87131

Dean Rinaldi has helped design continuing education/staff development programs for Albuquerque Public School professional staff. He is also Secretary and Immediate Past President of the Bernalillo Board of Education.

Mr. Joe Robinson
Valley High School and Career Guidance Institute
1505 Candelaria
Albuquerque, New Mexico 87107

As a staff member of Albuquerque Public Schools on assignment to Career Guidance Institute as a facilitator, Mr. Robinson is more than a liaison to either, he binds them together. He has a MA in clinical psychology.

Oklahoma City, Oklahoma

Ms. Alice Anderson
Director of Personnel Services Division
Oklahoma City School District
900 North Klein
Oklahoma City, Oklahoma 73106

Ms. Anderson is Director of the Personnel Services Division in the Oklahoma City Public Schools. Her division includes staff development/inservice education, the Human Relations Program, and the Volunteer Services Office.

Mr. Mike Barlow
Staff Development Director
Oklahoma City School District
900 North Klein
Oklahoma City, Oklahoma 73102

Mr. Barlow works closely with the Oklahoma City Chamber of Commerce to coordinate the Oklahoma City Adopt-a-School Program, matching needs and resources. His Staff Development Department includes the School Volunteer Program and the Human Relations Program of the District.

Ms. Vicki Ficklin, Coordinator
School Volunteer Services
Oklahoma City School District
900 North Klein
Oklahoma City, Oklahoma 73102

Ms. Ficklin has a masters degree in social work with specialties in community organization and social planning. She has recently become Coordinator of School Volunteer Services in the Department of Staff Development.

Ms. Linda Roberts
Oklahoma City Chamber of Commerce
One Santa Fe Plaza
Oklahoma City, Oklahoma 73102

Along with other responsibilities, including implementation of the Joint Training Partnership Act, in the Oklahoma City Chamber of Commerce, Ms. Roberts is the Chamber's representative in the Oklahoma City Adopt-a-School Program. She works with the school district in recruiting businesses and other community based organizations to help meet school needs.

Dr. Roger Stacy
State Supervisor, Industrial Arts Division
State Department of Vocational Education
Stillwater, Oklahoma 74074

Dr. Stacy served, until recently, as a professor in the Industrial Arts Department at Southwest Oklahoma State University. He has been State Supervisor for Industrial Arts since June 1983. In both capacities he has worked with higher education agencies, public schools, and industry.

Susan Wheeler
Administrator for Computer Instruction
Teacher Education Section/
Staff Development Section
State Department of Education
Oklahoma City, Oklahoma 73104

When Susan Wheeler began with Project WISE, she was Staff Development Coordinator in the Teacher Education/Staff Development Section in the Oklahoma Department of Education. Since then she has been promoted toAdministrator for Computer Instruction in the same section.

Austin

Mr. Dan R. Bullock
Director of the Governor's Office of Community Leadership
105 Sam Houston Building
Austin, Texas 78711

Mr. Bullock was Head of the Speakers Bureau for Forming the Future, a successful vehicle for promoting cooperation, understanding, and contributions from the total community for the Austin Independent School District. He has also been Vice President for Public Affairs of the InterFirst Bank. He has been an early advocate for school-business collaboration and in addition to his responsibilities in the governor's office, is chairman of Austin's recently formed Adopt-a-School Advisory Committee.

Dr. Dale Carmichael
Director of Inservice Education
Texas Education Agency
201 East 11th Street
Austin, Texas 78711

As Director of Inservice Education at the Texas Education Agency, Dr. Carmichael provides leadership in Inservice Education to Texas school districts and education service centers, and administers State Board of Education policies regarding staff development. He has also served as Director of the Community Schools Project and has received the Rural Education Research Award.

Dr. Reuben R. McDaniel, Jr.
Professor, Graduate School of Management
The University of Texas at Austin
Austin, Texas 78712

Dr. McDaniel was employed by two major private corporations and has participated in collaborative efforts involving the private sector and education.

Mr. Dan Robertson
Assistant Director of Planning and Interface
Austin Independent School District
6100 Guadalupe
Austin, Texas 78752

Formerly the Desegregation Specialist in the Austin public schools, Mr. Robertson has participated in the development and implementation of desegregation plans, staff development/inservice training programs, and multicultural education.

Ms. Crispin Ruiz
Community Affairs Director
Austin Chamber of Commerce
P. O. Box 1967
Austin, Texas 78767

Ms. Ruiz is in charge of the Chamber's responsibilities in the Austin Adopt-a-School Program and is a member of its Advisory Committee.

Ms. Marilla Wood
Vice President, Community Affairs Office
Texas Commerce Bank
P. O. Box 550
Austin, Texas 78789

Ms. Wood was a teacher in the Austin Independent School District until the first of her two children was born. Both children are now in Austin public schools. She was a newspaper columnist for the Austin American-Statesman before becoming Director of Governor William P. Clements' Office for Volunteer Service.

Southwest Educational Development Laboratory

Dr. Al King, Senior Researcher
Ways to Improve Schools and Education (WISE) Project
Southwest Educational Development Laboratory
211 East 7th Street
Austin, Texas 78701

Prior to Project WISE, Dr. King was Senior Researcher in the Ways to Improve Education in Desegregated Schools Project which focused primarily on using SD/IE as a major means of implementing multicultural education and smooth, effective desegregation.

III. OUTCOMES

A. FINDINGS IN LITERATURE

Businesses and schools have cooperated in the past and continue to do so. Much of this cooperation has come about because of school desegregation. A good desegregation program includes community involvement and support (King, 1982). In Dallas, Jefferson County (Louisville, Kentucky), St. Louis, and other cities, businesses provided leadership training and/or sponsored desegregation-related projects. In Boston, a federal court-mandated desegregation plan ordered certain schools paired with businesses and higher education agencies in the community. The desirability and benefits of school and corporate collaboration are being recognized more and more. The message of two sessions of the 1982 annual meeting of the American Association of School Administrators was a call for more and closer collaboration of schools and businesses (Education Daily, March 5, 1982).

It appears that most corporate involvement in school improvement activities focuses on direct preparation of high school and college students for work, particularly for marketable technological and other job skills. For this reason corporations contribute heavily to business and trade schools as well as to vocational and career education programs in public and private high schools and community colleges (Council for Advancement and Support of Education, 1978; Fraser, 1981). Business and industry also provide support and input for "transition" programs to facilitate youths' change from school to work. High school courses built on free enterprise and similar concepts are also designed to prepare students for the world of work, but deal more with values, attitudes, and knowledge of economic principles and business organization than with manual or technical skills (Elsman, 1981).

Most of the corporation-supported staff development for school staff members is also directly connected to vocation and career education. Most trainees are secondary or community college vocational education teachers (e.g., Koble, et al., 1975; Dieffenderfer, et al., 1977). Relatively little of the school-business collaboration has involved inservice education.

The literature of school-business collaboration for staff development does, however, have broader implications. For example, it was reported that a staff development program for vocational education teachers did improve the quality of vocational instruction in their classes (McElroy and Thomas, 1981). Several of the reports of these programs provide insight into teaching improvement strategies (e.g., Burt, 1971; Clark, 1978).

Further, even more of the studies provide guidelines and models for collaboration of schools and corporations, and some include

labor unions (Rath and Hagens, May-June, 1978; National Urban Coalition, 1980; Elsman, 1981; and Fraser, 1981). Of these, the National Institute of Education (NIE) supported four case studies of programs which upgraded vocational and educational opportunities for secondary school students (National Urban Coalition, 1980).

NIE also supported one of the most successful school improvement programs not directly for vocational or career education (Bassin, 1982). The initial strategy began in 1969, when a voluntary partnership was established between the New York City (NYC) High School Division and the Economic Development Council Inc. The Council was a non-profit organization formed to bring the resources of the business community to assist the public sector. The program was based on system improvement through organizational development and management by objective techniques (MBO). The program proved effective and popular enough to spread from the original two schools in 1969 to thirty in 1976, almost a third of the total N.Y.C. high schools.

Although the N.Y.C. program did not include staff development beyond MBO training for top level administrators, its successes and limitations may provide some guidelines for other school improvement efforts. Its strengths include, among several others:

1. Thawing a frigid system, creating not only a readiness but almost an expectation of change and improvement;

2. New programs can be quickly developed and implemented;

3. Collaboration of groups which have been historically viewed by systems professionals as adversaries.

Although reports do not claim that this intervention strategy was totally responsible for increased student achievement and decreased dropouts, suspensions, and expulsions, it seems likely that it made a significant contribution.

Those who examined the N.Y.C. program identified these limitations: it was voluntary and it caused stress (Bassin, 1982, pp. 7-8, 22). However, neither are serious or even necessarily limitations. Volunteerism may well be a source of strength. The literature indicates that while school people may not always identify the same priority of needs as consultants, people and institutions must want to change before effective change occurs. Further, meeting smaller needs can produce confidence necessary to challenge larger ones. Consultants involved in the intervention reported that they recognized stress-producing mistakes. A major error was in not taking the necessary time and effort to involve school principals as "part owners" in the interventions. The study is valuable for the guidelines it developed (Bassin, 1982, pp. 22-26), even though it would need further adaptation for other

school systems.

An example of the suspicion that a school board and administration can have about corporation-backed school improvement is shown in a report on "The Yazoo City/Mississippi Chemical Corporation Experience" (Deaton, March 1982). The corporation was concerned that the school system's reputation for poor quality caused two employment problems: (1) graduates from the schools were not qualified for many of the jobs which were open, and (2) many prospective employees refused to move their families into a district with such a reputation. The company's overtures of financial assistance in upgrading the school were spurned until assurance was given that the school board and administration would have control over all educational aspects of the improvement efforts. Until then, the school district officials expressed considerable doubt about the possibility of any positive outcomes for school or company collaboration.

Much of the recent literature proposes anticipated outcomes as a rationale for school-business collaboration. This is true of the several independent task force and/or commission studies with action agenda for national educational reforms, as well as public and private sector agencies proposing state and/or local initiatives. One way of examining these outcomes is with a typology of levels of anticipated results for different beneficiaries, i.e.:

- Global, national, and/or the larger society
- The local community
- A particular business and/or school or set of businesses and/or schools

These scopes of benefits are generally relative to the scopes of audience for whom the reports, manuals, and/or guidelines are intended. For example, A Nation at Risk..., a report by the National Commission on Excellence in Education (1983) has a nationwide set of concerns and anticipated outcomes. Action for Excellence (June 1983), a report by the Education Commission of the States Task Force on Education for Economic Growth, also has a rationale which is national in scope:

> There are few national efforts that can legitimately be called crucial to our national survival. Improving education in America (improving it sufficiently and improving it now) is such an effort. Our purpose is to reach as many citizens as possible and to persuade them to act. The facts on education and achievement in America have recently been gathered and presented by many different groups. What is needed now is to act on those facts.

Its agendum specifically calls for new relationships between schools and other groups, but the Task Force's emphasis is clearly upon education and business. The foreword to Action for Excellence summarizes this emphasis:

> **This report calls for new alliances among educators, school systems and many other groups in America to create a new ethic of excellence in public education.** We believe especially that businesses, in their role as employers, should be much more deeply involved in the process of setting goals for education in America and in helping our schools to reach those goals. And we believe that legislators, labor leaders, parents, and institutions of higher learning, among others, should be far more involved with the public schools than they are at present.

The literature of local S-B C programs, such as The Community Investing in Tomorrow..., about the District of Columbia Adopt-a-School Program (Prometheans, Inc., n.d.), stresses the development of local resources for the benefit of the entire community. And a study of school-business partnerships in 55 communities across the nation stressed "enlightened self interest" of local business leaders and educators. Here the corporate leaders are "convinced of the need to maximize return on dollars invested in public education," and educators, "hard hit by reductions in federal support, and demographic changes in the taxpaying and student" populations "need help to better manage shrinking resources and to organize new coalitions for public education" (Schilit & Lacey, 1982, p. 1).

On the other hand, nationwide associations and industries have also provided manuals for local company officials and school administrators. For example, the National School Public Relations Association has produced a locally oriented Basic School PR Guide: Involving ALL Your Publics (Ascough, 1980) and a Principal's Survival Packet, Volume 2 (NSPRA, 1983). The American Council of Life Insurance has addressed its Company-School Collaboration: A Manual for Developing Successful Projects (1983) to "the company official responsible for planning, implementing, and coordinating company-school collaborative programs." Based on its experience in the St. Louis Public Schools, the American Council of Life insurance Manual assures the company official that: "Company-school cooperation will benefit your company, your community, and your school" (p. ii).

The American Council of Life Insurance Manual is so forthright in its presentation of benefits as "practical reasons for encouraging company-school collaboration," that they may be interpreted as incentives. Because the ACLI lists generally

encompass the outcomes included in other literature, they are presented here (The American Council of Life Insurance, 1983, pp. 1-2):

To the Company and Its Employees

- Corporate taxes are used more effectively to support better schools.
- Business products, services, and policies are better understood.
- Job training needs decline.
- The image of the company and business is enhanced.
- Educators and students make more informed public policy decisions affecting business.
- Equal employment opportunities increase.
- Employee morale improves as they and their company become involved.
- Current employees' volunteer efforts become better organized and more visible.

To the Community

- Community stability is strengthened.
- Support for the school system increases.
- Schools are better able to respond to business and community needs.
- Local taxes are efficiently used.
- Community stability is enhanced.
- Cooperation among community leaders is developed.

To the Schools and Their Students

- Educators become aware of the business point of view on many issues.
- Teacher morale improves.
- Business and management techniques make school operations more efficient.

- Students and teachers are better informed consumers.

- Students and teachers are challenged by new ideas.

- Students will understand how basic skills are used in business.

- Students learn about careers in business.

- Job opportunities for graduates may develop.

It is perhaps typical that education/private sector collaboration in small and/or rural schools receives less attention than those of larger urban schools. This is unfortunate in that the small schools' staff development needs are considerable and may be more acute than those of large districts (Beck & Smith, 1982). However, the rationale for small and/or rural school-business cooperation has not been completely neglected. Grimshaw (1982) pointed out the mutually beneficial outcomes of school-business-community cooperation for "ensuring educational excellence" (p. 1) in rural areas of Michigan. Also with regard to Michigan, Elsman (1981) said that since rural school areas tend to have the greatest financial needs, the benefits from collaboration can also be great. Elsman added that: "Making the most of limited resources is what collaborative" efforts "are all about" (p. 62).

B. FINDINGS OF PROJECT WISE SITES

Outcome data are generally positive. The Albuquerque site, which had the earliest start of the three project sites, has more data with regard to S-B C. The Albuquerque data were gathered from interviews (mostly by telephone) of school staff and private sector representatives who have been involved in staff development activities in the CGI. All teachers at Valley High School have participated in some professional staff development activities, and many have engaged in a wide variety of such activities. Public sector and school representatives agree that: (1) contact and cooperation between the two groups have increased dramatically, (2) the level of activity achieved to date is proceeding well, and (3) the program will benefit students of the teachers who are involved (American Institute for Research, 1982).

In addition to Valley High School, the school-business collaboration project in Albuquerque has already been expanded to two junior high schools and three more high schools. There are also plans to involve more central office administrators in the project's staff development activities. Project WISE Liaison Team members for the Albuquerque site also report positive results from the inclusion of an SEA representative to its team. The SEA representative has assisted in providing more school-business collaboration information to the New Mexico State Department of

Education and to other school districts in the state. Many other school districts also have requested additional information about school and private sector collaboration.

Efforts by Project WISE Liaison Team members in Oklahoma City have rejuvenated the city's Adopt-a-School Program. Because of the Program's increased emphasis on staff training, school management of Adopt-a-School has been shifted to the Office of Staff Development within the Personnel Division. For more effective coordination of volunteer training and staff development, the school Volunteer Services Coordinator has also been moved into the Office of Staff Development.

The initial Oklahoma City School representative is the Director of Personnel. After Adopt-a-School and Volunteer Service programs were added to the Office of Staff Development within her division, she and the Project WISE representative, in conjunction with other members of the Oklahoma City Liaison Team, agreed that it would strengthen the project if the Director of Staff Development and Coordinator of Volunteer Services were added to the team. The Oklahoma City Liaison Team was thus expanded to seven members. The original five Liaison Team members subsequently agreed that this had strengthened the Project.

The Oklahoma City Adopt-a-School Program's new emphasis on training is also reflected in the Chamber of Commerce's choice of their Project WISE Liaison Team representative. She is also the Chamber's Director of Manpower Training. Most of the direct contacts between Adopt-a-School and local businesses have been made by two Project WISE LT members, the school's Director of Staff Development and the Chamber of Commerce's Director of Training. It was partly through their efforts that a business-sponsored incentive-to-read project, being piloted in one elementary school, has been expanded to every school in the district. Each school in the district also has at least one additional new business adoptor. Plans are being made for volunteer training to take place in all of the secondary schools and in as many elementary schools as possible.

The Oklahoma school and business representatives agree that the Project WISE Liaison Team provided the initiative to revitalize the Adopt-a-School Program. Also, the LT members agree that Project WISE plays an important role, especially by facilitating the interaction between the Project's three sites and by sharing information that it gathers from other sites and sources across the country.

Prior to Project WISE, the only school-business collaboration of significant scale in Austin, Texas had been the "Forming the Future" project. This project was directed by an Austin

Independent School District (AISD) central administrator and chaired by a prominent Austin businessman. The major goal of "Forming the Future" was to obtain public support for the public schools in a $210 million school bond election. A community education campaign was central to achieving this goal. School needs were assessed by a number of specialized task forces made up of many community members. These needs were presented as Forming the Future: A Report by the Community to the Board of Trustees on the Austin Public Schools (Forming the Future, October 1982), as well as by a speakers' bureau and an array of local media.

This successful Forming the Future campaign helped establish a climate conducive to additional school-private sector cooperation to help improve AISD schools. Soon after the campaign, the director of "Austin in Action," a Chamber of Commerce program to bring more of the city's businesses into its network of volunteer organizations, approached the President of the AISD Board of Trustees about the possibility of establishing an Adopt-a-School (A-a-S) program. Concurrently, Project WISE staff met with the AISD Superintendent to discuss the possibility of establishing a Project site in Austin. The School Board members and central administration both responded positively.

Subsequently, a measure of coordination of Adopt-a-School and Project WISE was arranged. The Director of "Austin in Action" and the Chamber of Commerce Director of the Austin Adopt-a-School program are both Project WISE Austin Liaison Team members. The Senior Researcher of Project WISE is serving on the Austin Adopt-a-School Advisory Committee, which also includes the Chamber of Commerce Director of Adopt-a-School and is chaired by the Director of "Austin in Action."

After the Austin LT was formed, it pursued several AISD suggestions for S-B C. Subsequently, it was decided that Project WISE could best benefit AISD by assisting with a collaborative project to facilitate the establishment of a magnet junior high school as part of the District's desegregation consent decree. The WISE LT is planning a collaborative SD/IE effort for a junior high school, already operational, as a pilot project.

The Austin Liaison Team has subsequently added two members. A major reason for this expansion was the appointment of the business/C of C team member to the Governor's Office for Development of Community Leadership. The two added are (1) the C of C Director of Adopt-a-School and (2) a local bank's Vice President for Community Affairs.

As seems to be generally true of representatives in education-private sector efforts, every project Liaison Team member has been extremely busy with many other responsibilities in addition to S-B C activities. This is not to say that the LT

members neglected, or were not supportive of, Project activities. It is to say that coordinating Project activities and sharing information through conference calls involving an entire LTs membership, much less involving all members of the three teams, has proven difficult. The members' diverse schedules frequently had them in meetings, out of their office, and/or out of town. Thus, efforts to facilitate, monitor, and share information took the course of and is limited to letters or individual telephone calls.

The need for direct, personal contact seems to be greatest in securing collaborators in the business community. There seems to be considerable difficulty with regard to a long distance telephone solicitation involving a business in a new venture such as volunteering its staff time, knowledge, and skills in education-private sector collaboration. School districts and state and higher education agencies appear to be more receptive to such ventures. This receptivity is probably a result of a combination of factors. These factors include (1) a knowledge of, if not a prior professional relationship with, the Southwest Educational Development Laboratory, (2) awareness of the need for such collaborative efforts, and (3) experience in at least two-party collaboration among the three agencies.

This relative need for direct person-to-person contact by business seems to have been apparent in early attempts to recruit business participants in Oklahoma. For example, in Putnam City, a great deal of time was spent in trying to establish a collaborative long distance relationship with first an Oklahoma computer software and hardware firm, and then through this firm to its home office in the northeastern United States. A Project WISE business relationship was finally established with the involvement of the Director of Training in the Oklahoma City Chamber of Commerce. Where direct personal contact is possible at a site where S-B C is being introduced, as in Austin, more time is apt to be spent on the initial decision-making and then in deciding upon which of the many possible projects to pursue. The difficulty in obtaining project approval for training from a specific business may indicate a relative advantage in a school district's working with several businesses at once. One way of accomplishing this is for the district to collaborate with its local Chamber of Commerce to survey available business resources and match appropriate training to needs of schools.

IV. PROJECT WISE WORKING CONFERENCE

A. PROCEDURES

1. Planning

Planning for the Working Conference began with the establishment of a conference goal consistent with the purpose of the Project. The Project WISE Working Conference goal was as follows:

> To obtain conferees' recommendations for the development of models, guidelines, and strategies for education-private sector collaboration to improve staff development/inservice education (SD/IE) to meet school needs.

In order to achieve this goal, objectives were set. The five objectives for the conference were as follows:

1) To present information about recent and current education-private sector/school-business collaboration (S-B C) from local, state, and national perspectives.

2) To determine how S-B C can include staff development/inservice eduction to meet school needs most effectively.

3) To identify issues and/or problems which might obstruct effective education-private sector collaboration.

4) To propose solutions for the issues and/or problems.

5) To produce a set of recommendations for development of models, guidelines, and strategies for education-private sector collaboration to improve school SD/IE.

Further planning, preparation, implementation, evaluation, and products of the conference were based upon these objectives and goal.

The initial plan, including a draft agendum, was drawn up by Project staff. Margaret Keys, a consultant in conference planning, was retained for one hour to recommend improvements in the plan and agendum. Ms. Keys, who is also a certified teacher, was helpful in improving the conference program. Her recommendation for a person to make an opening presentation was, coincidentally, Dr. Reuben McDaniel, a member of the Project's Austin Liaison Team.

Dr. McDaniel, a professor in the University of Texas Graduate School of Business, agreed to make the presentation. Because of

his experience and expertise in education-private sector cooperation, Dr. McDaniel was also helpful in his suggestions to improve the conference agendum.

Dr. McDaniel also suggested that there be a pre-conference meeting of Project staff and the conference's first-day presenters. Besides McDaniel and the conference facilitator, the presenters for the first day were to be the school LT representatives who would describe their local S-B C projects.

2. Preparation

The staff's major activities in preparation for the conference included:

a. Completion of a draft set of models and guidelines to send to conferees prior to the conference (Appendix A).

b. Selection and development of the conference theme: "The Future is in Today's Classroom."

c. Written and telephone communication with LT members to obtain feedback about the draft agendum and to provide them with information about the conference, lodging, etc., as well as about each other (Other than Project WISE staff, only one LT member had met members of other teams.) (As an example, the letter of September 7, 1983, to conferees, is Appendix B.)

d. Arrangement of a conference dinner and informal discussions at the home of a Project WISE staff member.

e. Development and/or adaptation of structured experiences to help establish an appropriate climate during the conference and to emphasize points about S-B C. These activities included:
   1) Groups
   1) "Loose Change"
   3) "The Artifact"
   (Descriptions of these are Appendices C-1,2,3.)

f. Development of individual packets of informational materials relative to and/or to be discussed in the conference. These included:
   1) Participant list
   2) Agendum
   3) 2 posters with regard to the conference theme
   4) Travel voucher
   5) Travel claim form and return envelope
   6) Guide to restaurants
   8) List of division advisors

9) National S-B C organizations
10) Selected references for S-B C
11) "Draft Model and Guidelines"

g. Completion of the final agendum (Appendix D).

h. Meeting with the conference's first day presenters.

The meeting of the first day presenters was held during the evening before the conference began. In the meeting were a school representative from each Liaison Team, Reuben McDaniel, and the Project WISE staff member who would be facilitator of the conference. This meeting provided an opportunity to discuss how the presentations would be interrelated. But more importantly, it established a collegial rapport among the presenters, a nucleus who would help spread this feeling of trust and cooperation among all conferees as they worked together for the next two days and beyond.

B. EVALUATION

1. Process

There were six sets of data analyzed in formative and summative evaluations of the WISE Working Conference and other aspects of the Project. These sets of data are: (a) pre-conference telephone and written surveys, (b) oral statements by conferees, (c) written statements by individual conferees, (d) qualitative statements written by role groups at the conclusion of the conference, (e) oral statements by conferees in a post-conference telephone survey, and (f) two unsolicited post-conference letters from conferees.

a. Pre-Conference Telephone and Written Surveys

During the two months prior to the WISE Working Conference, formative evaluation of the planning and preparation processes was accomplished by telephone and mail. At least four complete rounds of telephone calls were placed by Project WISE staff to Liaison Team members during August and September 1983. Most of these calls were to obtain (1) suggestions in planning the conference and/or (2) feedback with regard to conference plans and preparation. On September 7, 1983, a letter and draft agendum were sent to LT members. The letter included details about the conference plans to that point and solicited suggestions for improving the agendum. Following is a portion of that letter.

> A draft agendum is enclosed. Your suggestions for improving the agendum, i.e., for maximizing the productivity of our meeting, are sincerely solicited. A return envelope is enclosed for your recommendations. To be of assistance, your suggestions will need to reach me by September 26. A revised agendum and additional

information will be mailed to you prior to the conference.

Feedback from the 10 responses by mail and by several telephone calls and (in Austin) personal visits, contained suggestions from only one LT member. These were from Reuben McDaniel, who had several helpful suggestions to improve the conference program. Other LT members indicated that they were satisfied with the draft agendum.

b. Oral statements from conferees (N=13) near the end of the conference in response to the question:

"From the beginning of Project WISE to this point in our conference, what have we achieved?"

Responses:

"We really have some fantastic ideas."
[Two or three conferees voice agreement.]

"I learned how important some of the things we are talking about are. They really are on the cutting edge of some major components of change in our school districts. These are things that are going to have to take place if we're going to exist as a public school type of setting over the next few years."
[There appeared to be consensus, or at least a large majority of agreement, on this observation]

"Coming up here I had questioned in my mind, over and over, what is it we'll get out of this affair? I got an answer to that now. One of the things that I've gotten out of it is, it has made me look at our involvement in [our program] in a different way.... I think we learned from each other a whole lot. I've learned a whole lot as far as what kind of things to take back...."
[Several confereees voice agreement]

"Just meeting other people from different states and looking at this as a total regional effort, rather than: 'you do it here, we do it there, and we [compare to] see who's better and fight for resources and so on.' We'll never get anywhere that way. Now we can look at this...as a regional effort, and we can help each other along."
["Yes!"; "Right!"]

"It's really done that [as in statement above] for me. It's created a lot more contacts, a whole group of people doing something that is very similar, whereas before, I really saw us as just different sites. Now there's more of a context that we're all doing something, but there's so

many more resources that we know of now."

"This has built a context within which people are really doing and achieving. That's real important to be able to say to people, when you're trying to get them to buy into whatever [part of school-business collaboration], 'This is something that is being done [in another city], that is happening there now.'"
[Several conferees voice agreement]

"I think that one of the really important aspects of what we're learning, is that when there are no state or federal funds, it's all local effort and incentive. And that way it all goes back to the buying-in process. If you do it with local funds, local people buy it, local people own it, local people share it. And it makes a lot of difference."

"One of the things we picked up from this is learning which businesses are doing what in other places...Radio Shack..., Dairy Queen..., IBM, so now we go back and say to these businesses: 'Hey, they're doing _____ in _____, so OK....'"
[Several conferees voice agreement.]

"We need to know about [that or those businesses]."

"We have obtained quite a bit from each other, and the exchange has been valuable. And we know each other's telephone number, so we can aid each of us in our own district in our own state."

c. Written statements from conferees (N=13, two cooperated in writing one set) near end of the conference. The facilitator wrote the questions on newsprint:

"What should we do now? And/or Where do we go from here?

Conferees took about 10 minutes to respond in writing. The facilitator then collected the statements and read them aloud to conferees, and they discussed each. This feedback was solicited in order to get recommendations for future direction for the Project. These recommendations are discussed later in Section V. However, three of the suggestions provide evaluative data and are included here.

I also heartily suggest utilizing Reuben as a speaker-resource as he has with us. He is truly a valuable asset.

I liked the relaxers [Structured Experiences, Appendix C-1,2,3] - they were well-timed and useful for us in working within our own group.

Program should be implemented on a large scale within each state to include a much greater percentage of the schools.

d. Qualitative statements written by role groups at the conclusion of the conference.

The conferees (N=13) were grouped according to job roles as follows:

- School representatives (N=5)
- Business/Chamber of Commerce representatives (N=4)
- Higher and state education agency representatives (N=4)

Each conferee was given a Qualitative Evaluation sheet with the following instructions:

Each group select someone to record your statements. Your group will develop as many as 10 statements about aspects of the conference that your group believes were good/useful about the conference and as many as 10 statements they believe should have not been done or should have been done differently. Tally how many in your group agree with each statement. In the top right corner of this sheet, put in the total number of people in your group. Hand this sheet in with your written statements.

These evaluation statements were collected and analyzed by the Project staff member who facilitated the conference. The results of this qualitative evaluation are indicated below. Each statement has been coded, grouped, and sub-grouped under (1) Positive Evaluation and (2) Negative Evaluation according to the content of the statements. The number of conferees who agreed with each group and sub-group of statements is included in parentheses. Although there were 13 conferees, members of each group could make and/or agree or disagree with multiple statements. Thus responses can be more than 13 for a given item.

Positive Aspects (112)

1) The conference provided useful information (30).
   - Usable content (12)
   - Good information (13)
   - Enhancement of states' programs (5)

2) The conference provided a basis for worthwhile interaction/networking among conferees (14).
   - Conference interaction (5)
   - Mechanism for continuing exchange (4)

- Network established (5)

3) The conference was effectively organized (13).
   - Organization (5)
   - Structure (3)
   - Agendum (5)

4) The conference process provided a positive climate conducive to interacting and formulating ideas (26).
   - Structured Experiences (Appendix C-1,2,3)
   - Social aspects (Tuesday dinner, etc.) (8)
   - General process (4)
   - Very good conference (1)
   - Setting of the climate (8)

5) Conference evaluation methods are worthwhile (9).
   - Group discussions of written and oral evaluations were helpful (4)
   - Group effort for qualitative evaluation was productive (4)

6) The conference produced worthwhile results (7).
   - Productive (3)
   - Really a working conference (4)

7) Good conference facilities (9).
   - Physical setting (4)
   - Accommodations (5)

8) Good clerical support for conference (9).

9) Good facilitator of conference (9).

10) Good participants at conference (9).

11) Conference provided useful handouts to take home (6)

Negative Aspects (36)

1) Local public transportation was too restrictive (4).

2) The conference was too structured (6).

3) The conference did not provide enough time (10).
   - Provide more time for panel and questions (4)
   - Needed more time to discuss certain sections (2)
   - Lunch period was too short (1 was 65 mins./2nd was 75), (4)

4) Per diem expenses too small ($21 for meals) (4).

5) Invite appropriate representatives from business and industry (2).

6) Conference had inappropriate structured experiences (2).

7) Conference should be at a site where no one can be called to their office (3).

8) "Morning start time for conference [8:30 a.m.] was too early because of night or evening explorations of visitors" (3).

9) "Facilitator did not always communicate effectively with participants" (1).

10) "Objectives of the conference not very clear initially (1).

e. Oral statements by conferees in a post-conference telephone survey (N=14).

At the conclusion of the Working Conference on October 12, the conference facilitator told conferees that in two or three weeks they could expect a telephone call from a Project WISE staff member who would be seeking post-conference evaluation data. These telephone calls were made during the two-week period, October 24 through November 4, 1983. Plans were to have the survey completed during the first week, but some LT members could not be reached conveniently by telephone. Additional phone calls were made during the second week.

The survey consisted of three parts. One question was asked in order to obtain information about possible aspects of the October conference after conferees had had time to reflect on it and perhaps to use some of the conference information. This is stated below as Question #1.

Question #1: **What do you think has been/is/will be the most helpful thing you gained from the Project WISE Working Conference?**

A second question was asked in an effort to obtain information about shortcomings of the conference.

Question #2: **What would you like to get from a second conference that you did not get from the first?**

The third part of the telephone survey was a set of questions designed to obtain information about networking among the LT members during the 7 to 13 days since the conference, including whether they had plans to network. These questions are stated below as Question 3 a-b.

Question #3: **Since the conference, have you been in contact with:**

a. other members of your Liaison Team?
If yes, do you plan additional contacts?
If no, do you plan to?

b. member of other Liaison Teams?
If yes, do you plan additional contacts?
If no, do you plan to?

Responses to these questions are discussed below.

Responses to Question #1

The most helpful thing gained from the WISE conference has been/is/will be:

1) Contacts/Interaction/Networking with members of other LTs (10).

Examples of responses:
- "A network is developing."
- "People, contacts...they have already reinforced some things."

2) New ideas/ideas to improve our program (10).

Responses:
- "We never cease to learn; we [our team] picked up many good things."
- "We are planning a statewide conference to share what we got with others."
- "We have already used the [strategic] model with [state] school administrators and legislative sub-committees.
- "We are sharing new ideas with the Clark Foundation."
- "Everyone is interacting, generating new ideas."
- "We are planning and brainstorming with city groups in a working conference environment."
- "Knowledge of what other sites are doing."
- "Interaction; getting new ideas."
- "I realized that the field is wide open."
- "...interacting, getting new ideas to use."

3) "Reuben McDaniel was very helpful, more than just his presentation--his model and strategies...." (1)

4) Written guidelines and models
- "This helps in working with people who are not yet aware." (1)

5) General information "valuable information to us, helps us put pieces together." (1)

Responses to Question #2

What I would like to get/have from a second conference that I did not get from the first is:

1) More time (6)
   - "3 days at least"
   - "We trusted each other, were working well as a group"
   - "Especially to learn about other projects..., their secrets."
   - "Share more of what you know [conference facilitator] about specific projects - what doing at other Project WISE sites and around the country" - "more on what can learn from successes and failures." (1)

2) "Later, another such conference, when we have more to share, but we're working on phone network now."(1)

3) "Hope Project WISE staff will further develop Strategic model and implement some of the ideas that came up in the Conference....We need to develop the potential of these ideas." (1)

4) "Something specifically new in a S-B C concept."

5) Have other three states of SEDL region (1)
   - "Let our first 3 states have role in designing and presenting in next conference."

6) "More specific action planning about what to do when we get home." (1)

7) More information about what sites, other than those of WISE, are doing (2)
   - "More detail about what others are doing."
   - "More about what other cities are doing. If we can have conference soon, I'd like written information, including what you said [at conference]."

8) "I'm still thinking about the first conference." (1)

9) More business people involvement, CEOs and others, maybe CEOs in group to selves part of the time. (1)

10) Neutral site - where no one will be called out. (1)

11) Have short, set agenda. (1)

Responses to Questions 3a&b

3a. **Since the conference, have you been in contact with other members of your Liaison Team?**

Yes (9)

Example response:

- "We have been meeting to recruit more volunteers as well as with regard to our ongoing activities."

Do you plan additional contacts?

No (3)

Do you plan to?

Yes (3)

3b. **Since the conference, have you been in contact with any member(s) of the other two Liaison Teams?**

Yes (6)

Do you plan additional contacts?

Yes (6)

No (6)

Do you plan to?

Yes (4)

Sample response:

"As yet, I have no immediate plans to do so."

f. Unsolicited post-conference letters (2)

The following are quotations from the two letters received.

Dated October 17, 1983:

"I want to thank you for your hospitality and courtesy extended during our October 10, 11, and 12 conference in Austin. Your program was well organized, and enabled the Albuquerque contingency and I many opportunities to strengthen our knowledge base dealing with school/business alliance programs. I am looking forward to seeing the replication of the information that we generated during our three-day workshop and the opportunity to continue to exchange ideas and program development over the next few years.

"Also, thank your wife for her hospitality concerning the dinner on Tuesday, October 11, and of your own courtesy in allowing me to use your spa membership facilities to work out."

Dated October 21, 1983:

"You are to be commended on the exemplary meeting conducted last week in Austin. It was evident that you and your

staff are true professionals and most gracious hosts. The verbal evaluation from the group in closing revealed numerous compliments on the many accomplishments of the meeting."

2. Findings

It seems clear that conferees considered the Project WISE conference to have been a success, that they gained information and people contacts which they believe are or will be useful to them in implementing S-B C at their own and possibly other sites.

The data appear to show, in several ways, that the conference was successful. Most conferees indicated a need for more conferencing, like or similar to this conference, in order to obtain additional information and to broaden their emerging network.

The follow-up telephone survey questions, intended to solicit feedback with regard to how the conferees were disappointed in the conference, did accomplish its purpose. It did obtain information about how the conference could have been more productive from their standpoints (e.g.: "share more of what you know about specific projects...around the country" and "more specific action planning about what to do when we get home"). But this question also elicited responses which reinforce what other evaluation data show about the conference, that more of the same or similar is wanted--more and longer conferences, more people attending, and more information about education-private sector collaboration to help meet schools' inservice education/staff development needs.

According to the formative and summative evaluation data, it appears that Project WISE has accomplished the five objectives of the conference:

1) It presented information about recent and current education-private sector/school-business collaboration (S-B C) from local, state, and national perspectives.

2) It determined how S-B C can include staff development/ inservice education to meet school needs most effectively.

3) It identified issues and/or problems which might obstruct effective education-private sector collaboration.

4) It proposed solutions for the issues and/or problems

5) It produced a set of recommendations for development of models, guidelines, and strategies for education-private sector collaboration to improve school SD/IE.

And it has achieved its goal by:

Obtaining conferees' recommendations for the development of models, guidelines, and strategies for education-private sector collaboration to improve staff development/inservice education (SD/IE) to meet school needs.

C. PRODUCTS

As Dr. Reuben McDaniel said in the Project WISE Conference, it takes more than just "good people working hard" to be successful in collaborative efforts to develop human resources. A good model, and guidelines for applying that model, are necessary for effective school-business collaboration.

The goal of the Project WISE Conference was to pool the information, experience, and expertise necessary to develop models, guidelines, and strategies for S-B C; these, in turn, were to be used to improve staff development/inservice education to meet school needs. In a presentation early in the conference, Dr. McDaniel provided a foundation on which the conference could build the models and guidelines. McDaniel's presentation posited the context and components essential to effective S-B C. After discussing and refining the Context Model and its components, Dr. McDaniel and the other conferees (1) constructed versions of a Strategic Model, (2) identified and prioritized major issues to be resolved in implementing education-private sector collaboration, and (3) developed guidelines for resolving these issues.

1. Models

The following Context Model, based on Dr. McDaniel's presentation the first morning of the conference, is presented here in outline form. Following the outline is the text of his presentation which includes an elaboration on the Model.

a. Context Model with Four Components

1) SHARED OR OVERLAPPING GOALS: Human Resource Development
An impelling force for both/all parties
"Why should [each participant] collaborate at all?
"What will drive them into a joint effort?"

2) EXCESS OR EXPENDABLE RESOURCES: Knowledge/Expertise in Training
. Something that at least one party has and is willing to share or give up.
. Something to trade or barter.
. Resource must be useful to the other party/parties.

. Can be information, expertise, material, equipment, or money.

3) MECHANISM FOR THE EXCHANGE OF RESOURCES: Staff Development/Inservice Education
   . Permits collboration to take place.
     (Permits exchange of resources)
   . May be formal or informal.
     May not look like real mechanism
   . Must be observable by all parties.

4) FEEDBACK ON RESULTS: Measuring Differences in Schools Over Time.
   (Collaboration is energy consuming and collaborators need to know whether it is working or worthwhile)
   - Information about effectiveness of the mechanism. "Is it doing what we want?" "Does it benefit the children?"
   - Information about efficiency of the mechanism. "Is it doing it better than some other way?"
   - Sense of equity. "Is this an equitable relationship to all concerned?"
   - Reward/Cost-Benefit System. "What are the benefits for public and private sectors?"

A Context Model
for
SCHOOL AND PRIVATE SECTOR COLLABORATION
DR. REUBEN McDANIEL
Project WISE Conference
October 11, 1983

What I'm going to try to do this morning is to provide you with a model of school and business collaboration. The objective is to perhaps change slightly, make you think seriously about, the general thing called "school and business collaboration," and to think about it by using a specific model of collaboration. I hope that with a lot of what I say, you'll sit there and say, "Oh yeah!" Because if you do know that, then that means your programs are being successful. Maybe if I'm lucky there'll be one thing I'll say, and you'll go: "Gee, I hadn't thought about that." And then I'll feel like I'll have earned my keep for the day.

First, let me say something about what the necessary conditions of collaboration are. This happens to oe true anytime you have any kind of collaboration, but one ought to think about these conditions before one says join me in an effort, because in the absence of these conditions, I may say yes, but I won't do it.

The first condition is that there needs to be some shared or overlapping goals. I've got to have something that I want to

achieve that you can convince me I can achieve better or more economically or something by collaboration. So the very first thing that you have to do when you begin to talk about organizations collaborating is to ask: "Why should they at all?" "What are the goals that they share that will drive them towards joint effort?"

The second thing is that one or both parties has to have some excess resources. I've got to have something that I've not been using before I'm willing to give it to you. I don't walk around giving folks things that are important to me and neither do you. If you give something away it's because you believe you've got an excess "something." In order to get collaboration, the excess resources must be useful to the other party. See, one of the problems with certain kinds of collaboration is that I'm willing to give you all my junk. You can come down to my house any Monday morning and pick up whatever's sitting out front. You're welcome to it. The problem is, you don't want it either. So though they're excess resources in my terms, they're not useful to you. Now incidentally, that excess resource could be information. It doesn't have to be something material. It could be information.

Now the third thing that has to be in place for collaboration is a mechanism for the exchange of those resources. There must be some kind of a mechanism that permits the collaboration to take place, that permits the exchange of resources. While that can be formal or informal, and if it's informal it may look like its not a real mechanism, it must really be there; and it has to be observable by both parties or all the parties that play in the game.

The fourth thing is there has to be some feedback on the results of collaboration. All collaboration is energy consuming. The problem with getting married is that it takes so much energy to keep the marriage together. Part of the reason team-teaching works so poorly under certain circumstances, is that it takes a lot of energy to be part of the team. I mean independent of any results. So you need to get feedback on results of your collaboration and that feedback has to come in at least four ways. The first thing is you've got to get some (a) feedback on whether or not the collaboration is effective: "Did you in fact achieve the shared goals?" "Were there resources actually exchanged?" " Does the mechanism work?"

Second, you need (b) feedback about the efficiency of the system because if I can get my goals more efficiently through some means other than collaboration, I'm not going to collaborate. I may talk with you about it, but I'm not going to actually do it.

And third, (c) there's got to be a sense of equity in the system. Now Let me be careful about what equity means. Equity

does not mean equal, it doesn't mean everybody has to equally benefit or have equal resource commitment, but I've got feel like: "Gee whiz this is an equitable relationship." I can't feel like you're just taking advantage of me. Or you only use me when you need me. Or you only talk to me when there's nobody at the bar. Or you only look at me when there's no football game on. Whatever, I mean there's got to be some sense of equity, and in every collaborative effort, almost immediately people begin looking for feedback about effectiveness, efficiency, and equity considerations.

Last, but not least, (d) there's got to be a reward system, and in general, people in business think of that as some kind of cost-benefit system. I'm going to tote up, even in the most crude fashion, what the costs are to me for doing this, and what benefits are there to me for doing this, and that's going to have a lot to say about whether or not I continue to play in the game. Now that's a model for collaboration. And to be honest with you, I've found lots of people who want folks to collaborate who forget these things. Who say: "Well, you know you should help me because I'm a nice person." And I always smile and say: "You're absolutely correct, I'll be in to see you tomorrow."

But I don't have any interest whatever in helping nice people, unless I have some goal in my mind that causes me to want nice people to be somewhere. Or people say things like: "Let's get together and share." And I say: "OK, how are we going to do it?" "Well, I don't know, we'll work it out." I always go home at that point. Because it's not my job to sit down and invent mechanisms and to work on problems if I don't know how we're going to get together. But let's meet for lunch and you pay. Or, in the absence of feedback systems; if people don't let me see what happens as a result of my collaboration, I drift away from the system.

There's some considerable evidence that people's drifting in and out of churches has to do with a lack of feedback. You have to die to decide whether it's good or not. And there's not too many people who want to do that just to check out the system. So people tend to drift in and out of churches, and there's considerable evidence that when you examine people as to why they do that, it is: "I'm not getting any feedback about this thing."

So let me just say something about what I think, and this is a personal opinion (it may also be a professional opinion, but for the moment let me share it as a personal opinion), about what might come about from business-school collaboration with respect to this model. When I think about what the actual shared goals might be, I would argue that at least one of them is human resource development.

Both schools and business are aware of, and becoming increasingly aware of, the importance of human resource development in the accomplishment of organizational goals. People turn out to be the most critical resource in an information-intense, high-technology society, and that may be surprising. The first attempts at the introduction of high technology into society were attempts to reduce the people inputs into society; because at that time the people inputs were muscle power, and I can reduce muscle power by adding machines to the systems.

But the present attempts to introduce high technology are in many ways attempts to maximize the single trait that people have that machines don't have--and that's the ability to think about the world and make value judgments about it. That's why we talk about things like decision-support systems, systems to support individuals making critical decisions. It seems to me that the private sector needs better trained and better socialized workers, and I realize that saying "socialized workers" may be upsetting. The facts are, that that's what schools do to folks.

The private sector needs people better trained in basic skills; that is the first thing. When I asked my organizational administration class the other day: "What do you need to know to be successful in an organization?" they said all kinds of interesting things, but nobody remembered to say: "You need to know how to read and write." But that's something you need to know how to do in order to succeed in an organization. You need to know how to read and write. If you're going to pass my class you have to be able to speak English. I mean, it may be tough going on you if you are Saudi Arabian, but it's just tough. People who don't speak English in my class make grades called F's. And I don't even worry about it. So there's a whole set of basic skills that folks have got to have.

Secondly, there are also whole sets of advanced cognitive skills. And in general, we are talking about the ability to solve problems. That means a whole lot of things. It means the ability to organize data; it means the ability to prioritize things, to determine what kinds of things are critical within a system; it means the ability to see the relationships of elements in a given system. We can talk about these in terms of levels of cognitive skill, and talk about synthesis and evaluation as being advanced skills, which in fact people have to have if industry is going to be succesful.

Thirdly, folks need to have a certain set of values and attitudes in order to survive, at least in order for the private sector to survive. I was very pleased that [in the structured experience on groups] I finally was asked: "Are you conservative or not," since people always assume I must be some kind of liberal radical. I have been a liberal radical in my day, and still am in

some ways, but right now I'm more conservative than not.

There are sets of values and attitudes you have to have, including such things as coming to work on time. We could argue about whether people need to be to work on time or not, but there are economies where you are lucky if on a given day 40% of the workers show up. What are they doing? Having a good time. They just come to work when they need a little money, and then they don't come back when they don't need money.

There are all kinds of interesting values and attitudes that we need to think seriously about. For example, this question of merit wants versus economic wants. We tend to hear folks saying things like, "I want that at any cost." So, for example, I want to clean up Lake Austin at any cost because it's a wonderful thing to do. But that's a very, very expensive thing to do, and I'm not arguing for or against it.

All I'm saying is that the values and attitudes people have when they reach maturity are going to make quite a difference in whether or not private enterprise can survive in this country. And incidentally, I'm for private enterprise just so that doesn't get to be a mystery. I'm also for doing cost-benefit analysis of cleaning the environment. I don't believe the lake ought to be cleaned at all costs. I see too many poor people, I guess.

I think the public sector needs more knowledgeable and discriminating participants, and I could say the same thing in terms of basic skills and advanced skills and values and attitudes. But it is pretty clear that unless we begin to arrive at some consensus in terms of the appropriate role of the public sector in American life, we're going to have some interesting problems down the line, just in terms of how we spend resources.

Last, but not least, in terms of human resource development, individuals need skills to compete. One of the most interesting things to do ever, is to see a French major in an MBA class. It really is exciting, because they'll do whatever you tell them. You get a nice French major, you know, who did all the right things, was in Plan II at the University of Texas. If you're in Plan II at the University, you don't have to bathe because you don't smell. Plan II people are really special except for one problem; they don't get jobs and then they come over to the College of Business, "where the crud is."

But we folks get good jobs out of the College of Business, and French majors hang right on the ceiling by their teeth: "Anything you say Dr. McDaniel; just tell me how to eat." But it turns out, after all is said and done, in our society, people need skills to survive. It is not true that I am going to just take care of you because you are nice and smart and bright and have an independent

view of life. My view of that is: "...and you can collect the garbage too." So I think human resource development can be, and can come to be, a clear goal system in terms of private-public sector collaboration.

Now clearly, if you say that the knowledge becomes the excess resource, private sector knowledge includes such things as training and development techniques. And we could have an interesting discussion as to whether or not the private sector knows how to train people better or worse than the schools do. Let me just tell a little piece of story about that. When I was teaching in teacher education--and those who went through teacher education programs will sympathize with this--everybody said: "Student teaching was the best experience I ever had, the most wonderful thing that ever happened to me. And when I came out of that my eyes were just aglow." Ever see somebody try to teach third grade without knowing anything about teaching? Nothing is funnier than watching an intelligent person walk into a third grade classroom and spend six weeks. They come out going "[expletive]." The reason student teaching is such a good experience is because you had a course in kiddie lit, because you had a course in the teaching of elementary mathematics.

The reason why the private sector does such a good job of training, is that people in the schools have already had them sixteen years and beat the hell out of them, and of course they can be trained. I mean it's not very difficult. The nice thing about teaching Ph.D. students is that they already know everything. All you have to do is make them sign up for four or five years, then sign a piece of paper, and it's all over. So I'm not convinced at all that in fact the private sector knows more about training than public schools do, but I think they know some things that are useful. They know some things that are handy. They know some things that should transmit reasonably well.

What they do know is what a lot of people in the public school system don't know, and that is, what content is really required for organizational success. I think that a lot of people, public school teachers I know, who have a summer or semester working in private industry. They come back and at first all they say is the technical stuff they may have learned. But after you talk to them a while they say: "But the real thing I learned is what it takes to be successful at First National Bank; that's the real thing I learned." "The real thing I learned is what people are really doing at IBM, and what it takes to be successful there." And I think that private sector knowledge includes the criteria for organizational success.

Now I think public schools have some excess knowledge, too. One thing is the knowledge of needs of students. I don't think people in the public school sector communicate very well what the

needs of students really are, either their personal needs, or their developmental needs, or the price you pay if you don't attend to those needs. I think that could be better looked at.

Secondly, it may be true, and I don't know whether this is true or not, that public school people have more information about the content that is required for life success. Now, notice I didn't say organization success, because I really don't believe public school people have that information. But they may have some information about what's required for life success. And--given the present state of society--there's reason to believe that we're short on knowledge for life success.

And then thirdly, despite all the knocking of it, I think public school folks know something about the methodologies of transmitting knowledge and information.

Now what kinds of transfer mechanisms could we develop? One of the things we'll be talking about for the next two days are a variety of mechanisms, and I just want to touch on the notion of the training of trainers. Incidentally I see that as a two-way street, the training of trainers as a mechanism for school-private sector collaboration. Clearly, Project WISE represents a structured collaboration where there's an exchange of some knowledge resources. I think that a task that needs to be done, is to identify the private sector resources which are necessary to train teachers and are available to train teachers. I think there's some assumptions going around in the world that someone in the private industry knows all the mathematics that teachers in Texas need to know. I'm not sure that's a true statement; having been an engineer in Pennsylvania, I know it wasn't true in Pennsylvania. We did not have a corner on all that knowledge. It was in a lot of different places.

I think that it's really important that we identify what those real resources are, and by that I almost mean names and addresses and how many hours a day are they available. You'll have to get to that level in dealing with education-private sector collaboration. I think you've got to identify the appropriate public school people to participate in this collaboration. And I'm not sure that that includes everybody. Again I think you have to get names and addresses and dates and times of exactly when this is going to take place.

And then I think you've got to identify the rewards and costs for the participants on both sides. For example, when I was Deputy Commissioner for Medical Programs for the State of Texas, I had the following problem. I wanted my people to be better workers, but I didn't have any way to say to them that there was a reward system associated with doing that. In fact, they were guaranteed the following things: if they became more effective and more efficient

they would lose budget. That was an absolute guarantee for them. Because as they did their job better, somebody came along and said we don't want you to do the extra stuff so we're going to take away your budget. So the bigger caseload you can handle as a child protection worker in state government, the more cases you're going to get. And you're not going to get any more pay for doing it. There's no point in kidding yourself about that; you can't skim the cream, you're not going to get a bonus because you come in under budget. It took me a long time to figure that out. I always thought if you did a good job and came in under budget these people would say: "Good for you!" But they say "Stupid! Spend next year!"

So at the end of the year you've got a whole bunch of people screwing around, trying to spend money, you see. So you really have to think about what the rewards and costs are going to be for the players. Now, I'm not trying to promote something, I'm not saying the system ought to be any different; what I am saying is that you really have to think in terms of what the reward and cost system is for individuals when you're going to use the training of trainers as mechanisms.

Now there are other kinds of mechanisms where there are other kinds of rewards and costs. Okay, so I'm simply saying, in that case, you have to think seriously about it.

In general, as the feedback mechanism, we say what we are interested in is enhanced student preparation, and I think that's true. I think the kind of feedback both the public schools and the private sector want is enhanced student preparation. Now, we get into some difficult questions here, and I think a very tough one for the private sector to deal with is: "First, how do you measure differences in schools over time?" Private sector folks are very impatient, they go in and put in a marketing plan, they expect to see increases in sales quickly.

But the problem of schools measuring differences over time is a very difficult problem. Now we do better in thinking about differences between schools. If you looked in the Austin newspaper, I think it was yesterday, there's lots of between-school comparison and some within-school district comparison, but do we measure achievement levels? Is that the way we want to try to get at it? What about dropout rates? Is that really a significant indicator of differences in schools? What about a notion such as continuing education? That is, the number of students in a given school who continue their education, might be a better indicator than the number of people who drop out of that particular school. And that could be academic or vocational continuing education. Job placement has often been looked at as a measure of the impact of the private sector on the public schools. But you think you have to be concerned not only with unemployment but also with

underemployment in terms of whether you've made a real impact or not.

And obviously then, the rest of the question can be: "Are other measures used to tell differences between schools?" Do you know that the private sector adopting a school not only made a difference in that school over time, but what about the schools that didn't have a parent? Are they doing better or worse? My kids were better off at the Day Care Center. There's an interesting question as to whether or not parents do the best job of parenting. Are adopted schools really better than other schools, or are the changes you observe simply changes that would have occurred anyway?

I think folks in the private sector really want to be able to see the impact of what they do. I think they then are responsible for identifying what do you really want to see, how you want to see it, how are you going to see it, how are you going to be convinced that you've had an impact. What do I have to do, take you out to dinner? Should we have a banquet and give you an award? What are the things you want to see so that you know that you had an impact? And how much of the credit are you going to take? What is the impact that a given industry or a given organization or a given chamber of commerce has had, relative to all the other things that have gone on in a given school?

Now what kind of a reward do you get? It's one thing to say: "Well the feedback I get is changes in students"; but what are my rewards? Well, I want to talk just about the private sector rewards because I think the public school rewards have been talked about enough.

First, increased productivity. And one of the things you expect to happen is you expect to make more money. I think you expect it. If I go out here and I help the schools and I put money in the schools, etc., I expect increased productivity in my plant and my office.

Second, I expect better performance on the cutting edge of technology. Because one of the things that every organization is trying to do today--whether it be McDonald's, Texas Commerce Bank, IBM, whatever--is they have got to get better performance on the cutting edge of technology. They have somehow got to improve their technology, and that's going to require a great set of human resources.

Third, I want to have a stable, progressive community. And I'll define stable, progressive, and community. As a private sector group when I say stable, I mean a labor force that's not moving around all the time; when I train folks they stay there. On the other hand, if I want folks to transfer, they will. That's

probably a caricature, but we still want a stable community and we also want a progressive community. I think that it is a misstatement that private sector folks want a very conservative community that is "for the developers." They've got the problems the rest of us have, and they want a stable, progressive community.

Fourth, I think the private sector--this is going to be tricky--I think the private sector wants increased but easy and easily facilitated programs to support schools. I think that the private sector would be grateful if it could find reasonably well-defined ways to support schools, where the requirements are clear, and the expectations are clear, because I don't think that folks in the private sector are stupid. I think they have got some notions that if we had better schools, things would be better. But gee whiz, I'm not going to fight it. I'm just not going to hassle it. I mean, I may do a little bit of it to keep you off my back in the chamber, but I'll not get in there and really work at it if there isn't a rational and reasonable way of doing it.

And, fifth, I think the private sector just doesn't want to support school programs, I think it wants evidence that its support goes to school children. There's an interesting distinction. It's an interesting question as to what extent are you supporting a program of the school's and to what extent are you supporting school children.

So those are the kinds of rewards that I think the private sector wants to have out of school and business collaboration: increased productivity; I think they want better performance on the cutting edge of technology; I think they want stable and progressive communities; I think they want mechanisms to facilitate the private sector support for school programs; and I think they want to know that at some level the support actually has an impact on school children.

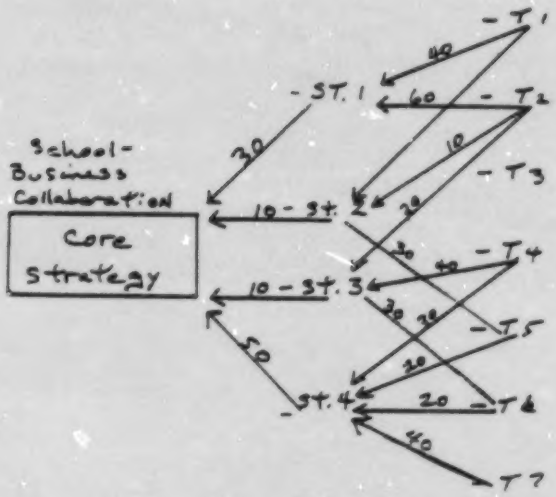
In summary, I've tried to lay out a model. And you can argue about it, I guess; we could discuss whether it's a rational and reasonable model, or if there are preferable models one might use for collaboration. But the model really says: you've got to share goals, there's got to be some excess resources available, there's got to be some transfer mechanism, there's got be some feedback system and there's got to be a reward system. And, I propose, in the absence of any of those five things, collaboration won't take place. And then I've tried to suggest some ideas that I may have about each of those in terms of the business-public school collaboration that we're talking about here in Project WISE.

b. Strategic Model

During a conference discussion of strategies to implement S-B C for inservice education, Dr. Reuben McDaniel provided a strategic

model to show the interrelationships of strategies and tactics. Dr. McDaniel's sketch of this model (Figure 1) and his remarks concerning it are included below:

Dr. McDaniel: There's a clear problem that has to do with the fact that everybody that reported seemed to recognize that things weren't quite combining correctly, that they'd like to go back and look at it. And I have a method for doing that, and it's a model that is handy for the kinds of thought processes that you're going through.



Strat. 1 = institutionalization

Tac. 1 = develop formal organization
Tac 2. develop permanent funding

Strat. 2. identify needs & resources

Tac. 3 = Conduct needs analysis

Strategic Model

Figure 1

Developed by
Dr. Reuben McDaniel
at Project WISE Conference
October 11-12, 1983

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There's a core strategy we've been discussing called school and business collaboration, then there are some individual strategies. And then there are a set of tactics that you plan to do to achieve those things. But the difficulty is that the strategies contribute unevenly to the development of the core strategy. So everything's not equal in the world. So if I look at Strategy 1 and I say 30% of the success of the core strategy is a function of Strategy 1. And 10% is a function of Strategy 2, and 50% is a function of Strategy 4; that's what those numbers mean.

If you can't do Strategy 4 you better kick the bucket because it's such an important thing. But maybe you can find another way to accomplish Strategy 2. But you've got all these activities out here and everybody tried to put them together in nice round form. I've got resources and I want to do this about resources, but then I had to make some editorials about whether it would also do these things over here.

There is another way of looking at it. Just look at Tactic 1 and develop a formula. First let's say Strategy 1 is institutionalization. Then Tactic 1 is to develop a formal organization. And 40% of institutionalization is a function of your ability to do that. Can you actually make that happen? Can you get somebody in charge? But that also contributes 10% to Strategy 2 which is to identify needs and resources, because formal organization permits you to know what folks want because they have a way of telling you. So the tactic to develop a formal organization contributes mostly to institutionalization but also makes a small contribution to developing needs and resources.

Now let's look at Tactic 2. Suppose that's to develop permanent funding. Now that probably is the biggest contributor to institutionalization, and it's hard to institutionalize something you don't have money for. Because you can't do some stuff without money; you need money. So let's say that 60% of institutionalization comes from funding. But funding contributes to lots of things. It contributes 10% to institutional needs and resources. It contributes 30% to whatever Strategy 3 is (I haven't the vaguest notion what it is but if I was working at it I would know). And then let's look at Strategy 2; we've got to identify needs and resources. But what's the biggest thing that contributes to needs and resources? Well, its Tactic 3, which is conduct a needs analysis. But you find out needs from other places as well. You also find out needs from having to try to get permanent funding. When you go out to get permanent funding, people tell you what they want you to do with it; they talk about the formal organization. I'll use your example about developing councils. You talked, John, about developing some community councils. That would contribute to institutionalization. It would contribute to needs analysis. But it would also contribute to the big thing you

were talking about, which is community understanding, which might be Strategy 3.

Unfortunately, all of us were taught to outline in school. And it really is unfortunate because the world doesn't come that way. But we all think in outline form. We tend to have a major heading and then subheadings. And we were all taught that you shouldn't duplicate any of that. Well, the world doesn't come that way; it is very complex and mixed up. And this way of thinking about it will let us first get over the problem of how you combine stuff, because it tells you how to do it. It also gives you a conception of what a multiple effect activities have. In other words, you get an activity that's important to a little bit of everything. It might not be a very important activity or it might be, but this at least tells you what it is. It also forces you to say that we've developed this contribution to success, and it forces you to say, "Gee, if we don't do this, and if we don't raise any permanent funding, boy that is going to go down the drain!" And it really gets at what the synergy of the system is. That's technically what you're trying to do. You're trying to identify the synergistic relationships between activities and strategies and goals. These charts can extend back seven miles.

Absolutely, it really does and this kind of keeps you away from locking into that outline kind of thinking, particularly in an initial planning or project like how you are going to develop school-business cooperation. You don't want to get locked into outline thinking. The next thing you know that divides work and the next thing you know that becomes job description and there's a critical administrative assistant who's holding the whole job in her hand because she's got the critical thing that's the key to everything. And you don't even know it and you wonder why it doesn't work. So I was just listening to you talk about it and this was the content. Seems methological, but I hope it can help you.

It's kind of interesting, it's as though if you work hard enough it will work, and I was having some difficulty with that. I don't know. I think as things get complicated, the way you go about doing them makes a hell of a lot of difference in how you get it done. In fact, I would argue that, just to be an absolute maverick, one of the things that happens in nonprofit human service kinds of organizations is an overbelief in willingness to work hard will get you there. I really think that that is disruptive. I think that people are important, but, boy, if you don't have some strategy for really making it happen, well, you can work for a long time.

Unidentified speaker: One thing about this method that's good is that it forces you to come up with an estimate of the relative contribution to success. I think a real seduction in working with

words is that you tend to put a lot of emphasis on things you've found to be important and if it agreed with something you feel strongly about as important, you tend to think, "Ah, that's great." We really need to have that in there, but if you're forced to sit down and say, "Okay, we'll compare these other five things though, how much does it contribute to success?", that's a more objective task. It asks you to do something other than look for your favorite items or look for things that you think are key. How much does it or doesn't it contribute.

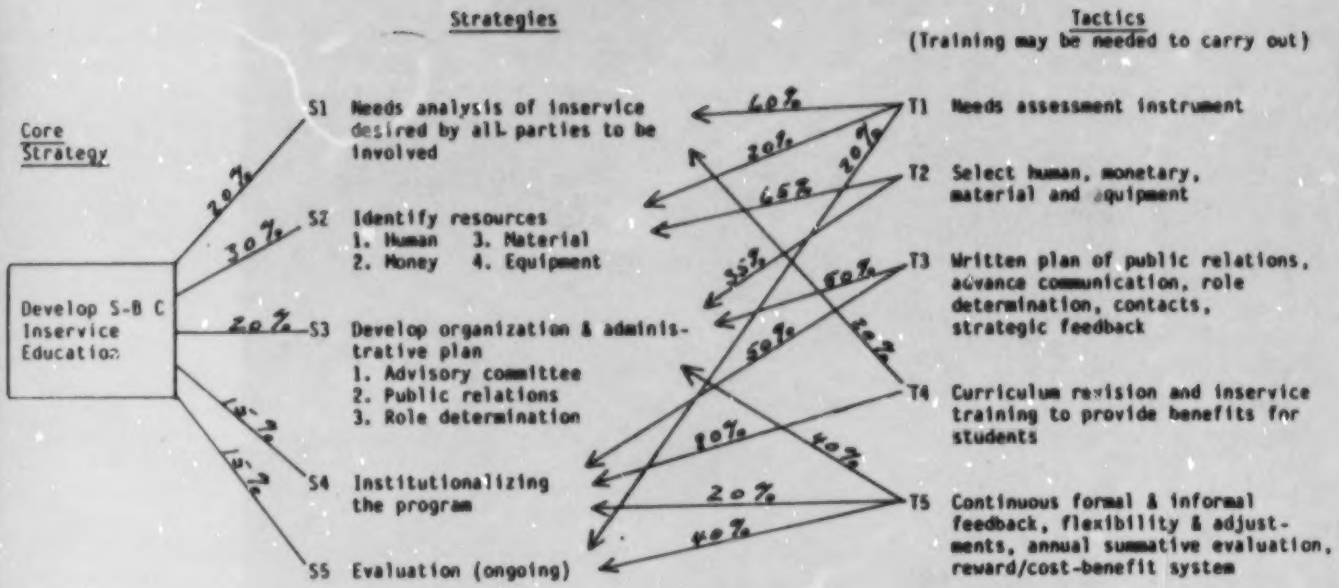
Another speaker: Once you are finding it...and have determined the percentage weight, you can concentrate your strength, give more effort and divide your time. Really good, I appreciate it.

King: I think we're moving toward success as we remember our goal, which was to obtain from you recommendations for improving models, guidelines and strategies for school-business collaboration. I'd like to take another step towards that in just a few minutes.

[End of text on Strategic Model]

While working in site groups, the Oklahoma City Liaison Team developed Dr. McDaniel's strategic model for application in their Adopt-a-School Program. A modified sketch of the Oklahoma City model is shown here as Figure 2.

STRATEGIC MODEL
SCHOOL-BUSINESS COLLABORATION
FOR
INSERVICE EDUCATION


Strategies
Tactics
(Training may be needed to carry out)
Core Strategy
Develop S-B C Inservice Educatio
S1 Needs analysis of inservice desired by all parties to be involved
S2 Identify resources
1. Human 3. Material
2. Money 4. Equipment
S3 Develop organization & administrative plan
1. Advisory committee
2. Public relations
3. Role determination
S4 Institutionalizing the program
S5 Evaluation (ongoing)
T1 Needs assessment instrument
T2 Select human, monetary, material and equipment
T3 Written plan of public relations, advance communication, role determination, contacts, strategic feedback
T4 Curriculum revision and inservice training to provide benefits for students
T5 Continuous formal & informal feedback, flexibility & adjustments, annual summative evaluation, reward/cost-benefit system

Adapted from a model developed by Reuben McDaniel and the Project WISE Oklahoma City Liaison Team at the Project WISE Conference, Austin, Texas, October 11 & 12, 1983

Strategic Model II

Figure 2

Oklahoma City Liaison Team Report, by Mike Barlow: One of the first things that we realized was that when we were thinking about Adopt-a-School and partnership programs, we were thinking directly about what we could do for the children in the classroom. We realized that there is an intermediate step. What inservice education can we provide for those volunteers who would help our schools? And how can we link up business and the community through inservice for the teachers and the administrators in such ways that they will be more effective in the classroom? And we used Reuben's model; our goal, our core statement was developing inservice education through school-business collaboration. We broadened the term "business" to mean community, school community, civic organizations, church groups, etc.

And our first strategy was to have a needs analysis of the inservice that all of the parties involved desired. Our second strategy would be to identify resources. The third strategy was to develop an organization and administrative plan for implementation which would include public relations, an advisory committee, role determination, and such. Our fourth strategy is institutionalizing the inservice program. The most important tactic here is to have inservice that is based on the new experiences and training that we've experienced in the WISE Conference and get that to relate directly to the classroom and to the curriculum. Our fifth strategy is to have ongoing evaluation of the program in order to maintain continuity. We have built-in safeguards to assure us that we're doing that we wanted to and that we continued to do what needed to be done.

Tactics get complicated. But in order to achieve the first strategy, which was needs assessment, we felt that the first tactic was the most important and gave it a weight of 60. This would be a needs assessment instrument. This needs assessment instrument would go both to the community sector and to the school sector. What is it that you need? That's important because that gets right at saying to the business community: "What do you need?" And the second part of that is, "What do you have to offer?" These questions are asked of groups: "What do you need and what do you have to offer?"

Also, as part of the needs analysis, it would be important to have the curriculum interface with inservice training. We gave that a weight of 20. It gave us a way to achieve the first strategy.

With the second strategy of identifying resources, we saw the most important second tactic as identifying and developing human resources, monetary resources, material resources, etc. Also, the needs assessment instrument would have an impact on that strategy of identifying resources.

For the third strategy, organization and administration, we would develop a written plan as a third tactic. The primary focus would be developing a written plan, public relations, and advisory committees or councils. This includes making the contacts that were necessary to implement the program, as well as the resources that had been identified and would become part of the organization-administration as the whole thing; you've got to organize it. But we did decide that resources would have to be organized and administered, and the curriculum part of it would have to be part of your organization. Thus, the largest segment would be developing the plan itself and then maybe the public relations would be the next largest.

Strategy four is the institutionalizing of the programs. Tactic four is the curriculum interface, the most important in institutionalizing the program. We had a weight of 80 on that. The idea is to make sure that what we've done really fits into the curriculum and programs that are going on in the schools. The written plan and the public relations are also important in institutionalizing the program and form the advisory council or committee. You have to make sure that they're aware of what you're doing and that it is being institutionalized.

And finally, the fifth strategy that is necessary, is an evaluation that is ongoing in order to maintain continuity and build in safeguards. An ongoing evaluation that is a combination of day by day, week by week, month by month and a year-end evaluation, so that we always know what is happening. The largest tactic, with a weight of 40%, was to develop continuous formal and informal feedback that had built in flexibility where you could make adjustments when you needed. Ongoing evaluation is no good if you are just reporting how well you're doing, and not doing anything to alter the course, if you feel that it's necessary. We also saw an impact on the evaluation continuity coming from the advisory committee and from the written plan itself. Also, way back at Tactic 1, the needs assessment, of course, would have an impact on evaluation strategy and relate to future needs assessment to see that you're constantly getting the kind of assistance that you need. Where we go from here would be to go back to the linear model of taking each of those, and connecting tactics and strategies, and making a plan of action to achieve what we show can be achieved.

2. Guidelines

There are important issues to address in education-private sector collaboration. Inherent in these issues are problems to be resolved and/or avoided. An important part of the goal of the Project WISE Working Conference was to develop guidelines and strategies for effective school-business collaboration. The first step in recommending effective guidelines at the conference was to

identify these issues and related problems.

A basis for the identification of issues and problems was established during discussions of (1) McDaniel's presentation on the context of S-B C and (2) the Project WISE draft "Models and Guidelines" (Appendix A. During FY84, Project WISE will produce a new set of guidelines by integrating these developed at the conference and those from the literature as found in the Draft Guidelines in Appendix A).

a. Issues/Problems

Issues and/or problems were identified by the conferees in general session. As they named the issues, the facilitator wrote them on newsprint where they could be seen by conferees. After the list was developed, reproduced by Project staff, and copies of it were distributed. This list of issues is as follows:

Issues/Problems Identified

1) How do we measure effects/give feedback?
2) How to identify resources?
3) How to facilitate "exchange mechanism"?
4) How to get people to buy into a system?
5) How to maintaining relationships once started?
6) How to establish trust?
7) How to sell mutuality?
8) How to expand and maintain continuity?
9) How to deal with time and extra load?
10) How to prevent burnout/boredom (including students)?
11) How to determine strengths?
12) How to eliminate misconceptions?
13) How to get funding?
    . Local
    . School
    . Grant/External/Private/Government
14) How to obtain resources other than funding?
15) How to institutionalize the process or program?
16) How to develop resources once they are committed?
17) How to evaluate?
18) How to resolve problems of "turf?"
19) How to develop/provide leadership (from all sectors)?
20) Who will be linker/facilitator?
21) How to involve and get support of students?
22) How to involve parents/community?
23) Who should control?
    . At what level
    . Why?
    . How?
24) How to assess needs/identify resources and match them?

b. Resolutions/Solutions: Guidelines

To produce guidelines for resolving the issues and preventing or solving related problems. The conferees formed into role groups as follows:

- School
- Chamber of Commerce/Business
- State and Higher Education Agencies

These role groups then went through a brief brainstorming activity (The Artifact, Appendix C-3) in which they were required to cooperate to solve problems.

The role groups took the Issues/Problems list with them to separate rooms to develop guidelines for Resolutions/Solutions. Their instructions were (1) to identify the most important issues related to school-business collaboration and (2) to develop the most effective ways to resolve these issues. The results of each role group's work are included here.

Panel Reports of Role Group Results
School Group

Issues

The five most important issues are: (and they are, we think, in process order as well as rank order)

1) How to institutionalize the S-B C process or program.
2) How to identify needs and resources, whether it be money, manpower, equipment or other.
3) How to get people to buy into the system.
4) How to establish and maintain trust.
5) How to measure the effects of S-B C and provide feedback to the collaborators.

Guidelines

Then for each of those five issues we came up with the corresponding five most effective ways to resolve these issues:

1. For the first one on how to institutionalize the process or program we said: You need to (a) clearly define the programs and processes, and next (b) establish commitment at the leadership levels. And finally (c) appoint effective facilitators.
2. For the second issue, how to identify and improve resources, we simply said conduct effective needs assessment of all parties involved, both the school parties and the private sector parties, organizational parties.
3. On the third issue, how to get people to buy into the system, we say: (a) recognize and identify common goals and strengths as the first step. Next, (b) identify complimentary exchanges of knowledge, skills, and abilities. By that we mean schools naturally will have some areas of weakness where the business

collaborator will be strong and can help the school. And the school entity will be strong in some areas that the businesses are weak in, so we feel that a complementary exchange is possible. And (c) maintain an avenue of continuing, open assessment of weaknesses. Do not be afraid to say: "Hey, we really don't have the know-how or the capabilities in this or that area. This is an area where we can really use your help." Be honest and open about that.

4. On the fourth issue, how to establish trust and maintain relationships. Our way to resolve it is through (a) inservices, inservices, inservices, workshops, (b) information exchange, and (c) what they use in Albuquerque, a school improvement teaming effort that's a joint effort between, of course, the school and the private sector of business representatives, on a continuing basis.
5. And finally, regarding how to measure effects and provide feedback, our recommendation for resolving this is to (a) utilize various evaluation instruments and (b) use targeted, open communication continually, up, down, and across.

Panel Reports of Role Group Results
Chamber of Commerce/Business Group

Issues

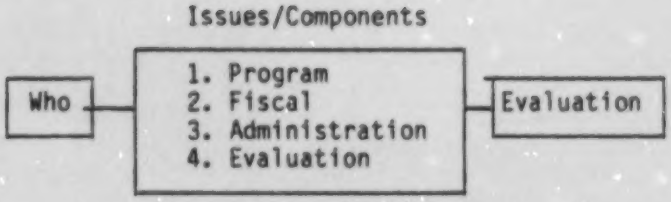
The four most important issues related to school-business collaboration are:

1) Program
2) Fiscal
3) Administration
4) Evaluation measurements.

Guidelines

1. Program--Success of the program is guaranteed by key players, including parents, business, educators, community at large, and students.
2. Fiscal--The major area of fiscal procurement of funding which is done by (a) corporate gifts and donations, (b) foundations through grant applications, (c) normal budget process of educational system, and (d) governmental responsibility.
3. Administration--The administrative process is used for direction, guidance, and control by using the following criteria: (a) Capability of staff to identify resources from all sectors; maintaining positive relationships through public relations and mass media to guarantee expansion and continuity. (b) Turfism problems must be handled only at an administrative level through continuous, open interaction, and by the development of leadership in all sectors. (c) A facilitator position (liaison) is critical for the control of the implementation process. (d) The most important role of the administrative process is the art of institutionalization.

4. Evaluation



We came up with a tool to use for the measurement and evaluation process. Begin by determining the players and what the program consists of. There are the four areas in the development of the evaluation and measurement: program, fiscal, administrative, and evaluation.

With a process like this, you can evaluate the program to see if it is actually working. You start with who are the key players, who's involved: is it the schools, the business, the community, the school board? Who's involved? Then you look at the fiscal area. You could move the fiscal down to the who, and then find who the key players are in the fiscal. Then do the same evaluation process on each of the four areas. Then you arrive at what you expect at the end of the program. This is a really simple way of doing evaluation and measurements. We actually are implementing a system like this in Albuquerque.

Panel Reports of Role Group Results
Higher Education Agencies and State Education Agencies

Issues

The eight most important issues related to school-business collaboration are (not in rank order):

1) Evaluation
2) Resources - identify, development, obtain & manage
3) Needs assessment - diagnostic identification for goals and objectives; future - short & long range planning
4) Continuity
5) Communication - linkages = relationships, trust, mutuality, public relations (students, parents, community), misconceptions, exchange mechanism, facilitator
6) Leadership - control
7) Ownership & rewards counteract boredom, burnout and overload
8) Intercurricular implementation (institutionalization)

Guidelines

(Although eight issues were prioritized, the SEA and HEA group developed guidelines for the five that they judged most important.)

1. Evaluation - resolution: Various ways to measure
   1) Did it achieve stated goals?
   2) Perception - gut feeling perceptions are also important
   3) Develop new ways of evaluation
      a) Data collection methods revised or identified
      b) To what extent have we achieved goals - where do we need to go and how much longer will it take to get there?
      c) Systematic process of feedback during whole process - not just at end. (monthly, bi-monthly, annually, depending upon project)
      d) Look for and at measureable factors
      e) Impact evaluation - what impact did project have on
         (1) kids? (3) community?
         (2) school? (4) Other? (including unexpected)
      f) Draw inferences from (and compare with?) other projects/states/data/information
      g) Changes and adjustments based upon what is shown by evaluation

2. Resources
   A. Identify
   B. Develop (management plan)
   C. Obtain
   D. Maintain
   E. Ideas: 1) field trips
      2) continually inform
      3) name recognition - who is involved
      4) recognition factors - banquets, newsletters, and brochures

3. Communication - Linkages
   A. Get principals involved as much as possible
      1) Overall advisory board - school, industry, community, legislative
      2) Sub advisory board - specific area specialists
      3) Peers informing peers - most effective
      4) Parents, students, community on committees
   B. Public relations - keeping everyone informed at all levels as much and as often as possible
   C. Break business/industry into clusters and link them with schools, etc. in the clusters

4. Ownership - Rewards
   A. Strokes for both - school and business
   B. Publicize who gets what, why and how

5. Intercurricular implementation
   A. Needs assessed first
   B. Goals and objectives set
   C. Advisory committee input/information/exchange of information

D. All curriculum interfaced with all elements of business information

[End of role group issues and guidelines]

The models and guidelines produced by the Project WISE Working Conference will be the bases for revising this information during FY84. After review and site-testing, the prototype models and guidelines will be produced. Information about these products will be disseminated to audiences who can use it.

V. CONCLUSIONS AND RECOMMENDATIONS

A. SITES AND LIAISON TEAMS CONCLUSIONS AND RECOMMENDATIONS

1. Conclusions

Reports from the three Project WISE sites indicate that education and private sector collaboration is a viable concept and worthy of implementation. Further, the liaison team approach appears to be an effective means of facilitating school-business collaboration. These conclusions seem warranted by the following developments with regard to the Project WISE sites and Liaison Teams.

1) **At each site, Liaison Teams have been established, comprised of representatives of the school district, a collaborating business or chamber of commerce, a higher education agency, the state education agency, and Project WISE.**

2) **At each site, these LTs have identified businesses and industries which have training capabilities appropriate to to addressing identified needs in the school district.**

3) **Successful (as identified by the school district) SD/IE training has taken place at the Albuquerque, New Mexico site.**

4) **Information about their successful S-B C has been provided by the Albuquerque team to other school districts in New Mexico and to the other two Project WISE sites. Successful replication of S-B C has been reported by these other New Mexico districts (including the one for which one of the Albuquerque LT members is a school trustee). Among these districts are small, rural schools.**

5) **The Austin and Oklahoma City LTs have identified training needs in their districts and have planned IE activities for their schools.**

During the Project WISE Conference, when LT members were considering the question: "What have we achieved?" there was consensus that while at the conference they had realized

> ...how important some of the things we are talking about are. They really are on the cutting edge of some major components of change in our school districts. These are things that are going to have to take place if we're going to exist as a public school type of setting over the next few years.

This same discussion session concluded that Liaison Teams are an effective way to implement S-B C and recommended that the conferees and the Project "continue to enrich the Liaison Team concept at each site."

One conferee's conclusion with regard to sources of S-B C funding precipitated discussion which produced general agreement. The conferee's initial observation was:

> "I think that one of the really important aspects of what we're learning, is that when there are no state or federal funds, it's all local effort and incentive. And that way it all goes back to the buying-in process. If you do it with local funds, local people buy it, local people own it, local people share it."

During the ensuing discussion, at least two corollaries emerged as additional conclusions:

6) **Grant funds from a non-local source, such as a private foundation, could be quite helpful in starting and/or maintaining a program.**

7) **"Outside" funds can be used without compromising the positive benefits of school-business cooperation, when its control and management are local and collaborative.**

The CGI program in Albuquerque has benefitted from Clark Foundation grants which helped initiate the Career Guidance Institute and helps pay salaries for its staff from the private sector.

2. Recommendations

Several important recommendations can be drawn from the experiences of the Project WISE sites and LTs. In addition to the guidelines discussed in Section IV Conference Products, Liaison Team members made other important recommendations with regard to implementing S-B C. Some of these recommendations emerged from their experiences at their respective sites and others during interaction with other sites' LT members at the WISE Conference. Following is a discussion of these recommendations.

Recommendations emerging from conditions at the local sites

1) **If vocational and/or career education programs are successful, consideration should be given to building on that success in expanding S-B C.**

This is indicated by the positive results from the Albuquerque site as well as others in the literature.

2) **If there are cohesive labor unions in or near the collaborating school district, consideration should be given to including them as a collaborator in S-B C.**

This stems from the Albuquerque experience in CGI, as well as from the literature. A relatively large portion of S-B C literature includes consideration of organized labor and supports its involvement where viable. Much of this literature discusses collaboration in terms of industry-education-labor partnerships in advisory councils or other team collaboration approaches (Elsman, et al., 1981; Fraser, et al., 1981; Gold, et al., 1982; McNett, 1982; and Glover, 1981).

3) **If the school or business has a committee or office for volunteer services, consideration should be given to including it in S-B C activities.**

The Oklahoma City LT reports that it is desirable to (1) coordinate the community's voluntary services to the OC school district, and (2) have this office and the staff development office coordinated as parts of the total S-B C program. This arrangement improves the efficiency and effectiveness of the training of volunteers who provide services to the district. Volunteer teacher aides have already been trained. School and business representatives who will be involved in S-B C to provide SD/IE are being trained.

Recommendations emerging from Conferees' interaction at the Project WISE Conference

LT members also made recommendations for their own and/or other Liaison Teams and Project WISE staff at the Working Conference. Six of the recommendations for the LTs are as follows.

4) **Members of each Team would try to visit the other two Project WISE sites.**

The school representative of the Austin site visited the LT members in Albuquerque during the summer of 1983 and reported that the visit produced insights which made him more effective in preparing for S-B C in Austin. Other conferees agreed that this would be helpful for them and that they would try to arrange similar visits to other sites.

The conferees also agreed, regardless of whether intermural visits could be made, that:

5) **Participants in S-B C activities should be in frequent telephone and/or mail contact with S-B C participants activities at other sites to share mutually beneficial information.**

Conferees also agreed that they should:

6) **Make opportunities to share with other districts and with other schools in their districts, information about education-private sector collaboration.**

A similar recommendation was one of three which included Project WISE staff as well as other LT members:

7) **Information about S-B C should be disseminated to other states, school districts, and potentially collaborative businesses in the SEDL region and the nation.**

Project WISE, including its SITE LTs, should:

8) **Look for innovative ways to assess S-B C projects and communicate successes (and failures) to constituents.**

and to:

9) **Continue to nourish the Liaison Team concept at each site.**

B. CONFERENCE CONCLUSIONS AND RECOMMENDATIONS

1. Conclusions

During the two-day Project WISE Working Conference, seven conclusions became clear as a result of interaction and information-sharing between the conferees. These conclusions are as follows.

1) **School-business collaboration can play an important role in "the changes which need to be made in the public schools if they are to continue to exist."**

In this period of scarce resources, public schools need to seek and utilize all resources which are available. The private sector has knowledge and skills which can be transferred to schools through staff development/inservice education.

2) **A collaborative arrangement, such as a liaison team, should be considered as an effective approach for S-B C.**

3) **The collaborative team should include representatives from, at least, from the participating school or district, business or chamber of commerce, and state education agency, as well, perhaps as from other locally appropriate public agencies or private organizations.**

4) **Models, such as the Project WISE Conference "Context Model" and "Strategic Model," are necessary for effective and cost efficient S-B C.**

5) **Guidelines, based on the experiences of other S-B C activities, can be of critical importance to teams who are planning and implementing S-B C.**

6) **Interaction and/or networking between S-B C teams at different sites is useful for learning about guidelines and for gaining new ideas and insights in the implementation of education-private sector cooperative activities.**

7) **Interaction between members of different site teams, as in a working conference, is apparently helpful in implementing S-B C.**

2. Recommendations

In addition to the models and guidelines discussed in Section IV as products of the Project WISE Conference, six recommendations for effective education-private sector collaboration were also produced. Each is stated below with a set of recommendations which conferees suggested for Project WISE.

1) **Sites which are contemplating the implementation of S-B C activities should hold a conference wherein members of various site teams can interact to produce insights and ideas which will be useful in helping the sites achieve their goals. If possible, one or more sites which have had successful S-B C experiences should be included in the conference.**

Recommendations for Project WISE

a) Hold a follow-up conference in spring of 1984.

b) Hold follow-up conferences in each of the three states (New Mexico, Oklahoma, and Texas).

c) Bring conferees back together at least once a year to exchange ideas and share new program activity.

d) Hold conferences such as this (Project WISE Working Conference) in all six states of the SEDL region, but include more sites/school districts.

e) Hold another conference; invite three other states of the SEDL region, plus the three already here.

"Break its sessions down into the specific components identified at this conference (i.e., needs assessment, resources, etc.). Share what more we have by then in these areas with each other and the three other states, and they can gain and give information within these areas."

2) **A center for information and technical assistance should be established to assist sites in the implementation of education-private sector activities.**

Recommendations for Project WISE

a) Establish Project WISE as the nexus for private sector-education projects within the region.

b) Use the Project as a clearinghouse for materials and information developed at as many sites as possible.

c) Project WISE should continue its research and development of models, guidelines, and strategies for S-B C.

d) The Project should help individual sites anywhere with information, guidelines, strategies, and models.

e) Project WISE should conduct a follow-up survey to evaluate effects of the ideas taken from this meeting and share the information with these three sites and others.

3) **The liaison team approach should be further developed.**

Recommendations for Project WISE

a) Project WISE should implement each strategy developed at this conference and share the results with these three sites and others.

b) Project WISE should be implemented on a large scale within each state and include a much greater percentage of the schools.

c) Project WISE should continue to enrich the liaison team concept at each of the three sites.

d) Project WISE should assist in obtaining financial support for staffing school/community implementation teams in school districts throughout the region.

e) Project WISE should help sites be even more innovative in seeking and managing resources and longer term commitments (more than one year).

f) Project WISE should look at more innovative ways to assess projects and communicate successes (and failures) to constituents.

g) Project WISE should formalize a network system that involves this group in an on-going basis to further develop S-B C.

4) **A central source of qualified technical assistance for implementing S-B C should be established.**

Recommendations for Project WISE

a) Project WISE should help sites in grant-writing to funding sources.

b) Project WISE should offer technical assistance to sites in the region to achieve successful S-B C results.

c) Project WISE should help sites be even more innovative in seeking and managing resources and to look at longer term commitments (more than one year).

d) Project WISE should look at more innovative ways to assess S-B C projects and communicate successes (and failures) to constituents.

5) **Special efforts should be made to establish a climate for more education-private sector collaboration.**

Recommendations for Project WISE

a) Project WISE should provide public relations exposure for sites represented in the Austin conference. ("The more who hear about the projects, the more support will be received for other projects.")

b) Project WISE should provide public relations information to headquarters of corporations who have plants or offices in the cities which are potential S-B C sites.

c) Project WISE should encourage businesses, civic organizations, etc. to ask themselves: "What can we do to help education?"

d) Project WISE should encourage schools to become more "open" in their approach to education, i.e., "get the teachers and other staff into relevant learning that can be provided by the private sector."

e) Project WISE should look at more innovative ways to assess projects and communicate successes (and failures) to constituents.

6) **Assistance should be provided to assist schools and other S-B C participants to obtain funding for projects.**

Recommendations for Project WISE

a) Project WISE should keep its sites informed of possible funding, grants, foundations, etc., to initiate and/or implement S-B C projects.

b) Project WISE should try to help obtain financial support for: (1) staffing school/community implementation teams throughout the region, and (2) enhancement of current efforts ("especially money for staff salaries and administration of the program").

c) Project WISE should help sites in grant-writing to funding sources.

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APPENDICES

A. Project WISE Draft Model and Guidelines

B. Letter of Invitation to Project WISE Working Conference

C. Structured Experiences
   1. Groups
   2. Loose Change
   3. The Artifact

D. Conference Agendum

E. Definition of Terms

APPENDIX A

MODELS AND GUIDELINES

FOR

SCHOOL-BUSINESS COLLABORATION

TO IMPROVE

STAFF DEVELOPMENT/INSERVICE EDUCATION

Draft for Discussion and Recomendations

at a Conference Sponsored by

Ways to Improve Schools and Education (WISE)
Division of Family, School and Community Studies (DFSCS)
Southwest Educational Development Laboratory (SEDL)
Austin, Texas

Second Floor Conference Room
211 East 7th Street
(512) 476-6861

October 11 & 12, 1983

INTRODUCTION

It is difficult to capture the breadth and excitement of education-private sector cooperation to improve schooling. It is relatively easier to see the depth in individual community programs in which concerned and capable people of different job roles and sectors are working together to resolve issues and improve children's futures by improving schooling and education.

Several factors combine to fuel what is generically called School-Business Collaboration" (S-B C). Among these factors are: concern about declining levels of academic scores and job-readiness skills, as well as diminishing public funding for schooling. A "rising tide" of well publicized reports have called attention to perceived deficiencies in public education. Some of these reports have recommended steps to take in order to remedy these deficiencies. Prominent among these is a call for S-B C.

Recently there has been so much fervid activity in promoting S-B C that it might be perceived as being in danger of burning out from its own momentum and become a passing fad in education. S-B C has, however, been around for decades, particularly in vocational and career education programs and has been shown that it can have positive effects there and in academic programs as well.

When the fervor subsides, education-private sector collaboration may be the major strategy for improving schools in the 1980s. To maximize its potential for improving general schooling, however, it will have to be based on sound principles.

The Project for Ways to Improve Schools and Education (WISE) is an exploratory study to develop sound models and guidelines for education-private sector collaboration. Project WISE is building its data base through (1) a review of literature, (2) telephone interviews, and (3) the expertise and experience of Liaison Teams at three sites: Albuquerque, New Mexico; Austin, Texas; and Oklahoma City, Oklahoma.

These sites are among hundreds, perhaps thousands, of school-business projects to improve schooling. Most of these projects have developed since the 1960s. And in the past five years especially, there has been a rapid proliferation of new projects and expansion of others. As information about S-B C projects becomes available through a growing literature and evolving networks, new projects do not have to begin "in the dark."

Leaders who are initiating or expanding education-private sector programs have information from the literature and other projects, as well as their own experience and expertise, developed in desegregation, vocational and/or career education, and other collaborative programs to rely on.

ISSUES

It seems that myriad issues may affect the implementation and outcomes of S-B C. At our conference we will probably want to identify these issues and discuss how to deal with them. We may also want to set priorities about which issues are most important and/or should receive most attention, as well as the order in which they should be dealt with.

MODELS

How do we organize models for clearest explanation and/or ease of implementation? There seems to be several ways of looking at available models. These include:

I. Focus on Organizational Aspects

A. Public and Private Creation of a New School.

Local business representatives and school district staff collaborate to plan and develop a new school.

Ex.: Dallas Skyline Career Development Program

Ex.: Austin Magnet Junior High School

B. Curriculum Development/Revision

School and business representatives collaborate to modify or create a curriculum.

Ex.: Raytheon Data Systems employs and trains Norwood, Maine, School District teachers and supports school computer programs.

C. Teacher Internships in Business

School teachers, administrators, and counselors work in private sector jobs to learn more about business/industry opportunities, skills, and philosophy, as well as to have inservice training to keep pace with changing technology and management practices.

Ex.: Kentucky Staff/Industry Exchange Project.

D. Community Development Partnerships have broader improvement projects/ programs which include public education.

Ex.: The Allegheny Conference on Community Development, began as a civic association of Pittsburgh business/people to deal with such problems as flood control. The Allegheny Conference then became

involved with economic and downtown renewal activities which pointed up the need for paying attention to education. The Conference's educational program includes an Adopt-a-School (AaS) project managed by the local Chamber of Commerce (C of C).

II. Focus on Creation of an Employable Work Force

These S-B C models may focus on vocational education, career and/or entry- education, even basic skills. Some are based on the premise that the best way to improve post-secondary employability is through improvement of the quality of schooling and education in general.

A. Work-Study, students work in part-time jobs, earning wages and academic credit in their junior and senior years of high school.

B. Summer Youth Employment, designed to improve employability, increase career awareness, and encourage continuing education of youth.

C. Career Exploration, business and non-profit intermediaries, cooperate to provide to students, and sometimes teachers, experiences in a variety of careers and occupations, and to assist youth in making realistic choices.

Ex.: Chicago United, includes 15 Career Development Centers which are staffed by volunteer teachers who receive inservice training as necessary and are teamed with business managers who work on a half time basis.

D. Student Learning and Employability

Ex.: Hartford, Connecticut, School/Business Collaborative (S/BC), was formed in 1982 for the purpose of optimizing student learning and youth employability. Efforts focus on developing human resources through volunteering skills and financial assistance. Several S/BC activities include staff development such as: inservice sessions for school principals and business leaders on how to incorporate Ron Edmonds' "Effective Schools" program in the school program, and how to implement computer assisted instruction.

III. Focus on Organization

A. Adopt-a-School programs, sometimes called "School-Business Partnerships," vary in scope. They may be City/District wide administered jointly by the school and business(es) involved, or a

single school paired with a business in its vicinity. It may also be administered by a third party as intermediary between the schools and businesses. Partnerships are usually reviewed periodically and partners may change.

Ex.: Dallas Adopt-a-School Program, managed by the Dallas Chamber of Commerce (C of C).

Ex.: Adopt-a-School, a cooperative program of the Oklahoma City Public Schools and the Oklahoma City Chamber of Commerce.

Ex.: Albuquerque Career Guidance Institute, directed by the Albuquerque C of C utilizes AaS relationships as a portion of its overall activities.

B. Third Party Agencies set up by collaborative arrangements between schools, the private sector (which may include labor organizations), and, in some instances, city government. These third party agencies may be set up as a non-profit organization, 501(c).

Ex.: Boston Tri-Lateral Council for Quality Education, 501(c), grew out of desegregation and AaS partnerships with the schools. But for stability, the Council was organized independently and housed in the C of C.

Ex.: Albuquerque Career Guidance Institute.

C. Collaborative/Advisory Councils, made up of community leaders who want to solve educational, economic, and/or social problems. These councils usually grow out of an expectation that an improved performance of one institution, or a set of institutions, will result in mutual benefits.

The strongest roots of these councils are probably in vocation and career education, as reflected in their generic types of "Industry-Education-Councils," "Work-Education Councils," or similar terms. But local names for these vary from community to community. Collaborative councils have been distinguished by several criteria: these include broad-based membership, relative autonomy, performance based agenda, sharing of power and responsibilities, formal organizations, and, usually, a budget.

Other model categories to consider include membership, staffing, and funding source, as well as others.

GUIDELINES

What are the most effective ways to organize guidelines? (1) Developmentally, more or less in sequence? (2) Grouped within topic areas, such as "maintaining momentum"? Or (3) by type of model, such as collaborative councils? For discussion purposes, examples of these are shown below. (In the next draft, after the October 11-12 conference, explanatory text will be added to each guideline.)

I. Guidelines organized developmentally, more or less in sequence.

- Inservice education/staff development is usually necessary to prepare different role groups to collaborate.

- Commitment from company leadership is essential. The chief executive officer's support is absolutely necessary. The more directly he or she is involved, the greater the chances for success.

- On the school side, support from the individual school's principal is equally important. Of course, school board approval should be sought, but without the involvement of the principal, programs in schools simply do not work.

- Both parties must accept the premise that the ultimate goal of the collaboration is to improve the education of all students. Nothing must interfere with that objective, even though individual projects may have more limited target audiences.

- Programs need not follow established patterns as long as they meet mutually agreed upon goals and planning.

- Planning should include representatives from all collaborating agencies. Schools should include companies in their long-term planning and companies should conceive of their educational efforts as part of that long-term plan.

- Both parties should agree that the collaborative effort be given time to develop. A year is the usual length of an initial agreement.

- Honesty and flexibility should characterize each interchange between the partners. Schools should be realistic about what business can provide and open to new approaches. Companies should be straight-forward about the extent of the resources they will commit and sensitive to the realities of the schools today.

- Realize that schools do not and cannot operate like businesses.

- Businesses should look at participation in S-B C as something more than a means of preparing and recruiting potential employees.

- Provide the community with full, accurate information and stay away from publicity gimmicks.

- Promise only what you can deliver and be realistic about the results you can expect.

- Businesses should plan to make more than a financial contribution.

- Build up to success.

- Stick with your program through the inevitable rough spots.

- Define problems and issues.

- Focus on a specific issue, and discuss needs, strategy, and timetable for resolving it.

- Identify allies and opposition and move to recruit supporters.

- Select leadership and a staff that is effective in communicating and in arguing principles.

- Plan to utilize each member of the coalition, how to use them in research, public opinion, economic data.

- Recruit opinion leaders/makers to help.

- Devise a clear, specific plan of action.

- Evaluate resources, budget, and timing.

- Organize; distribute tasks; alert the staff to performance goals and tasks.

- Work through a task force or executive committee when appropriate.

- Keep the program honest, with public opinion surveys and other community input.

- Develop supportive case materials such as factsheets, media backgrounders, newspaper features, data sheets, speeches, editorials, advertising aides, and news releases.

- Identify and enlist experts to help.

- Explain the issue in terms of its economic impact using current data.

- Reach all pertinent media.

- Remember to keep all constituent members informed and involved.

- Take the case to the public and back to the legislators if necessary. Don't rely on any one communications medium. Among the many ways to reach the grassroots are editors, columnists, opinion makers, direct mail, and advertising. Make available reprints that constituents can forward to their lawmakers.

- Review regularly the strategy and interim results.

- Document results and communicate them to member constituencies.

- Commitment of school superintendents and company chief executive officers is fundamental.

- Local Chambers of Commerce and other business associations can effectively mobilize city-wide resources.

- Provide ample time and resources for planning prior to program start-up.

- Start with a small, manageable pilot effort with potential for growth.

- An evaluation design built in from the start provides timely feedback on performance and results.

- Corporate in-kind services and personnel can supplement school funding.

- Quality staff are crucial, particularly a program director who is trusted and respected by educators, business leaders, other collaborators, and the community.

II. Guidelines for Collaborative Councils

- Principles for effective participation in collaborative councils are based on common business sense.

- Be aware of the local context--its opportunities and restraints.

- Companies should articulate their objectives in participating and the resources it is willing to commit.

- Work with co-participants to identify specific problems and areas of mutual interest.

- Select the problem area to be addressed and develop a range of approaches for doing so.
- Design a specific plan of action with clearly defined tasks for each participating agency or individual.
- Implement and evaluate the plan.
- Capitalize on the momentum and use the results of the evaluation to begin on the next problem area.
- Focus on issues of mutual community-business concerns.
- Involve the highest level participants: chief executive officers, school superintendents, government leaders.
- Start small, then build on success.
- Choose well-defined, short-term activities.
- Plan the implementation stage with care.
- Designate someone capable, professionally respected, and interested in the project to take charge.
- Develop a monitoring system.
- Pay attention to publicity and internal communications.
- Seek advice from local and national experts.
- Give credit where credit is due before, during, and after the project.
- Evaluate successes and failures.
- Use momentum to start up the next project.
- Set up regular and frequent meetings.
- Encourage members to do their homework.
- Assign high-caliber professionals.
- Actively seek input from all segments of the local and national scenes.
- Work to adapt individual goals and priorities to community needs.
- Build additional coalitions based on partnership work.
- Provide training for new community leaders.

- Recruit new members from the community.

III. Guidelines for Maintaining Momentum

- Some "Do's":

  Set action-oriented and achievable goals and objectives.

  Make sure at least one person has enough time to devote to the project/program.

  Get all members involved.

  Build influence in the community.

  Become a "neutral and honest" information center.

  Stay flexible.

  Stay politically aware.

- Some "Dont's":

  Get involved in sustained battles over institutional turf.

  Take on more activities and projects than the program/project can handle.

  Try to serve too large an area.

  Be disorganized or unprofessional about fund raising.

  Become dominated by a single interest group.

APPENDIX B

September 7, 1983

Dear ,

The Ways to Improve Schools and Education (WISE) Project at the Southwest Educational Development Laboratory (SEDL) in Austin, Texas, formally invites you to be a participant in its "Working Conference on School-Business Collaboration to Improve Staff Development/Inservice Education." The conference will convene on October 11 and 12, 1983 at SEDL which is located at 211 East Seventh Street. Meetings will be held in the Second Floor Conference Room.

Members of the Liaison Teams from the three Project WISE sites are being invited. These sites are Albuquerque, New Mexico; Oklahoma City, Oklahoma; and Austin, Texas. A roster of these team members is attached for your information. I expect about eighteen people to attend.

This conference is part of the Project WISE scope of work for FY83. The project has gathered information on school-business collaboration through its three sites, and from other school-business collaboration projects and knowledgeable individuals across the United States, as well as a search of relevant literature.

The purpose of the conference is to solicit a set of suggestions and/or recommendations from participants which will provide directions to project staff in developing guidelines, strategies, and models for school-business collaboration. A basis upon which recommendations will be made will be a set of models and guidelines drafted by project staff and sent to conferees prior to the conference. The insights and experiences of conference participants are expected to help formulate the set of recommendations.

Major highlights of the conference include: (1) a featured speaker/resource person, (2) presentation and discussion of information gathered by the Project, (3) conferee small group and general work sessions and discussions (we will each be a resource for other conferees), and (4) an evening of informal interaction. A draft agendum is enclosed. Your suggestions for improving the agendum, i.e., for maximizing the productivity of our meeting,

are sincerely solicited. A return envelope is enclosed for your recommendations. To be of assistance, your suggestions will need to reach me by September 26. A revised agendum and additional information will be mailed to you prior to the conference.

Hotel reservations for you and other out-of-town conferees are being temporarily held at the Sheraton-Crest. It is located at 111 East First Street. Room reservations at a special lower rate are guaranteed to be held for you until 6:00 p.m. on October 10, 1983, if you return the enclosed reservation card to the Sheraton on or before September 27, 1983. The hotel is booked solid for the nights of October 10 and 11. Therefore, only by returning the enclosed card can you assure yourself of a room. Remember: each participant must fill out a card and return it by September 27 to ensure that you will have a room for the nights of October 10 and 11.

The conference will meet all day October 11 and until approximately 3:00 p.m. on October 12. Air departures should be scheduled to leave Austin at 4:00 p.m. or later on October 12, 1983.

Round trip travel, lodging, and meal expenses will be reimbursed by the project. This includes air fare (coach, economy, or supersaver, but not first class), hotel, meals, and miscellaneous expenses if appropriate (e.g., airport parking, ground transportation). For your convenience, the Sheraton will provide free van transportation from and to the airport. Upon arrival, use the Sheraton's free phone in the airport lobby and request pick up.

Ground transportation expenses will be reimbursed (up to $10.00) for those who ride a taxi from home or office to the airport and from airport to home. If you drive to and park at the airport, parking expenses are reimbursable. Receipts must be attached to the conference expense voucher for: (1) airline ticket (stub), (2) hotel bill, (3) parking costs, and (4) ground transportation. More details about the reimbursement process will be supplied later.

Meal allowance maximums, including tips, are: Breakfast - $4.00; Lunch - $6.00; and Dinner - $12.00. Thus, a day's expenses should be no more than $22.00 per day. There will be no need for dinner expenses on the night of Tuesday October 11 as my wife and I are planning an informal meeting of the conferees at our home. Food and beverages will be provided.

I will appreciate your confirming, before September 26, your intent to participate in the conference. Your confirmation can be indicated on the enclosed form. This form and your suggestions on the agendum can be returned in the same enclosed envelope.

Be sure to mail the Sheraton Hotel's reservation card as soon as possible, but definitely for receipt by September 27, 1983.

I look forward to hearing from you regarding your input on the agendum and your participation in the conference. Should you need additional information, please do not hesitate to get in touch with me.

Sincerely,

A. L. King, Ph.D.
Senior Researcher
Ways to Improve Schools
and Education (WISE) Project

alk/sl
Enclosures:
Draft agendum, response form, return envelope, hotel reservation card, list of conferees

APPENDIX C (1)

GROUPS

GOALS: (1) Participants to become acquainted.
(2) Participants to realize that everyone belongs to more than one group.
(3) Promote cohesion within larger group.

Group Size: Any number over 5

Time: 20 minutes

Meterials: - 3x5" card and straight pin for each participant*

- 20 pages newsprint for signs to indicate categories

- Easels, chairs, or something else to display

Setting: Room for participants to move around and position themselves in groups under or around signs.

Procedure:

1. Facilitator has each participant fill out 3x5" card, as per the attached "Hot Button/Cold Button" example, and pin it on.*

2. Participants circulate among each other, reading cards and getting acquainted for about 5 minutes.

3. Facilitator exposes first sign at each of four stations and asks participants to go to appropriate station, according to his/her sibling order. The facilitator may want to ask questions, such as "What effect upon your life do you think your order in the family had?"

4. Another sign is turned at each station, indicating labels of "Liberal," "Conservative," etc. and participants arrange themselves accordingly. And so on until time is up or each sign is turned. While participants are changing stations, they will be noticing other people's Hot/Cold Buttons and learning more about each other.

5. The facilitator engaged the participants in a discussion about their experiences and feelings, emphasizing that any individual is in more than one group.

GROUPS

INSTRUCTIONS

Divide participants into one then another of groups:

A. Sibling Order

1. Oldest child
2. Middle child
3. Youngest child
4. Only child

B. Religious Affinity

1. Catholic
2. Protestant
3. Other
4. Not sure

C. Political

1. Liberal
2. Conservative
3. Progressive
4. Middle of the Road

D. Educational Concern

1. Quality of education
2. Funding
3. Public confidence
4. Discipline

APPENDIX C (2)

Loose Change

Purposes

1. Ice breaker

2. Liven up group, as after lunch

3. "Shows how your actions are affected by actions of others."
   ("Did you start one way and switch to another?")
   Indicator of how we react to those of different values or are perceived as having different values or as being out to get what they can for themselves.

Time: 10-15 minutes

Groups of 5 (or so), any number of groups
Take out coins up to 75 (count your money)
If one in the group has no coins - OK
Get in close circle
Put coins in one hand, hold that hand toward center

[Round One]
First - for 4 or 5 minutes
Use free hand to take coins from your coin hand and put in someone else's hand
No talking! (Will be better effect if you don't talk)
Process One: "What did you observe?"

[Round Two]
Second - for 4 or 5 minutes
Use free hand to take coins from someone else's hand and put in yours.
Don't put in anyone else's hand, only in yours.
Don't talk.
Process Two - "Observations?" "Any change in attitude (yours--others)"?
"Behavior (yours--others)"?
Discuss - (Go over purposes.)

APPENDIX C (3)

THE ARTIFACT: BRAINSTORMING AS A PROBLEM-SOLVING ACTIVITY

Goals

I. To generate an extensive number of ideas or solutions to a problem by suspending criticism and evaluation.

II. To develop skills in creative problem-solving.

III. To develop skills in group cooperation.

Group Size

Any number of small groups composed of approximately six participants each.

Time Required

Approximately one hour, for the described example.

Materials

Newsprint and felt-tipped marker or other writing materials for each group.

Physical Setting

Movable chairs for all participants.

Process

(The facilitator may wish to do the sample experience which follows as a preliminary to a problem-solving session involving a real problem.)

I. The facilitator forms small groups of approximately six participants each. Each group selects a secretary.

II. The facilitator instructs each group to form a circle. S/he provides newsprint and a felt-tipped marker or other writing materials for each secretary and asks him or her to record <u>every</u> idea generated by the group.

III. The facilitator states the following rules:

1. There will be no criticism during the brainstorming phase.

2. Far-fetched ideas are encouraged because they may trigger more practical ideas.

3. Many ideas are desirable.

IV. The facilitator gives each group an "artifact" (a penny), announces that these were found at an archeological "dig" (maybe adding details relevant to the local scene), and that participants are to imagine that they have never seen anything like this artifact, and that they are to generate ideas about what it is, what it was used for, and what it might be used for now. She or he tells the groups they have fifteen minutes to generate ideas.

V. At the end of the generating phase, the facilitator tells the groups that the ban on criticism is over. She or he directs them to evaluate their ideas and to select the best ones.*

VI. The facilitator then asks participants to form one large group again. Secretaries act as spokespersons and take turns presenting the best ideas from their groups. Participants explore how two or more ideas might be used in combination.

VII. The facilitator writes the final list of ideas on newsprint, and the group is asked to rank-order them on the basis of feasibility.

VIII. The facilitator leads a discussion of brainstorming as an approach to creative problem-solving.

Variations

*I. All ideas, or the best 10, may be selected.

II. Groups may be set up to compete with one another. Judges may be selected to determine criteria for ideas and to choose winning groups.

III. Other objects can be used in the problem. Participants may brainstorm uses for a belt, a can opener, a flashlight, a rope, an oar, or a corkscrew. Props may be used.

ARTIFACTS: Found November 4, 2116 A.D., at a site 175 miles due west of the northwest point of Galveston Bay, and midway between the Colorado River and the Guadalupe River.

APPENDIX D

A WORKING CONFERENCE ON
SCHOOL-BUSINESS COLLABORATION
TO IMPROVE STAFF DEVELOPMENT/INSERVICE EDUCATION

Sponsored by the WAYS TO IMPROVE SCHOOLS AND EDUCATION PROJECT (WISE)
DIVISION OF FAMILY, SCHOOL AND COMMUNITY STUDIES (DFSCS)
SOUTHWEST EDUCATIONAL DEVELOPMENT LABORATORY (SEDL)
Austin, Texas

THEME: **"THE FUTURE IS IN TODAY'S CLASSROOMS"**

GOAL: To obtain conferees' recommendations for the development of models, guidelines, and strategies for education-private sector collaboration to improve staff development/inservice education (SD/IE) to meet school needs.

OBJECTIVES:

1. To present information about recent and current education-private sector/school-business collaboration (S-B C) from local, state, and national perspectives.
2. To determine how S-B C can include staff development/inservice education to meet school needs most effectively.
3. To identify issues and/or problems which might obstruct effective education-private sector collaboration.
4. To propose solutions for the issues and/or problems.
5. To produce a set of recommendations for development of models, guidelines, and strategies for education-private sector collaboration to improve school SD/IE.

DATE: October 11-12, 1983

PLACE: Southwest Educational Development Laboratory
211 East 7th Street, 2nd Floor
Austin, Texas
(512) 476-6861, X 255, 243

AGENDUM

Tuesday, October 11, 1983

Morning

8:30 - 9:00 Registration, Conversation, and Refreshments (juice, coffee, tea, doughnuts)

9:00 - 9:20 Introductions and Welcome
- Dr. Al King, Senior Researcher, WISE
- Dr. David L. Williams, Jr., Director, Division of Family, School and Community Studies

9:20 - 9:30 Travel Expenses and Other Housekeeping Details
- Sylvia Lewis, Administrative Secretary, WISE

9:30 - 9:50 Role Groups in Collaboration
- Al King

9:50 - 10:20 School and Private Sector Collaboration
- Dr. Reuben McDaniel, Graduate School of Management, The University of Texas at Austin

10:20 - 10:35 Interaction Between Presenter and Other Conferees

10:35 - 10:45 Break - Refreshments in Room 400

10:45 - 11:05 Models for School-Business Collaboration Projects
Room 400
- Al King

11:05 - 11:35 Description of Project WISE Sites
- Three Person Panel, Composed of:
  . Mike Barlow, Oklahoma City - 10 minutes
  . Milton Baca, Albuquerque - 10 minutes
  . Dan Robertson, Austin - 10 minutes

11:35 - 11:55 Discussion of Site Projects

11:55 - 1:00 Lunch (On Your Own)

(Tuesday continued)

Afternoon

1:00 - 1:15 Trust Building for Collaboration

1:15 - 1:50 Group Discussion of Issues, Priorities, and Agendum

1:50 - 2:20 Discussion of Project WISE Draft Models and Guidelines

2:20 - 2:30 Break

2:30 - 3:20 Brainstorming Role Groups

3:20 - 4:10 Role Group Work
Schools -- #402
C of C and/or Business -- #404
Higher Education & State Education Agencies -- #406

4:10 - 4:30 Summation, Review, and Discussion of Tomorrow's Activities

4:30 Break

Evening

7:00 - 9:00 Dinner and Evening Session: Food, Beverages, and Discussion
at home of Nancy Baker Jones and Al King
5802 Parkwood Drive (see map in packet)
892-0224
(Transportation will be provided for hotel lodgers.
Pick-up time will be 6:30 p.m., at front entrance
to Sheraton Crest.)

Wednesday, October 12, 1983

Morning

8:30 - 9:00	Refreshments and Conversation
9:00 - 9:10	Attitudes and Values About Schools and Schooling
9:10 - 10:05	Panel Reports on Yesterday's Group Results
9:10 - 9:25	School Representative
9:25 - 9:40	HEA & SEA Representative
9:40 - 10:05	C of C/Business Representative
10:05 - 10:20	Discussion of Reports
10:20 - 10:30	Break
10:30 - 11:45	Work in Liaison Teams
	#402 - New Mexico Team
	#404 - Oklahoma Team
	#406 - Texas Team
11:45 - 1:00	Lunch (On Your Own)

Afternnon

1:00 - 2:00	In-depth Panel Reports from Morning Group Work - Room #400
	1:00 - 1:20 Texas Team
	1:20 - 1:40 Oklahoma Team
	1:40 - 2:00 New Mexico Team
2:00 - 2:15	Discussion of Reports
2:15 - 2:45	Summative Comments by Conferees
2:45 - 3:00	Conference Evaluation
3:00	Adjourn

APPENDIX E

Definition of Terms

Schooling - individual training or education received at an educational institution.*

Education - the aggregate of all the processes by means of which a person develops abilities, attitudes, and other forms of behavior of positive value in the society in which she or he lives.*

Staff development - refers to any personnel changes to improve education and includes two aspects: (1) inservice education, and (2) staffing (selection, assignment, etc.).

Inservice education - any planned activity to assist school personnel in improving their professional effectiveness after employment. The activity can be undertaken individually or with others, informally or in a structured context. The improvement can be through the acquisition of knowledge, changes in attitude, and/or development of skills.

Human Resource Development - employee development where development is explicitly related to productivity.

Desegregation - the ending of segregation, the bringing together of previously segregated groups.

Integration - is the situation wherein people of different groups tend to interact cooperatively on a basis of equal status and trust, as they know, understand, and respect each other's culture and contributions.

Quality education - is the outcome of effective schools and includes a range of experiences that (1) focus on learner academic achievement, (2) employ a variety of teaching methods, (3) promote learning on the part of all students, (4) take into account individual differences, (5) produce learner competencies in terms of measurable knowledge and skill outcomes, and (6) develop positive student behavior in and out of the classroom.

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*From Carter V. Good, ed., Dictionary of Education. New York: McGraw-Hill Book Co., 1973.